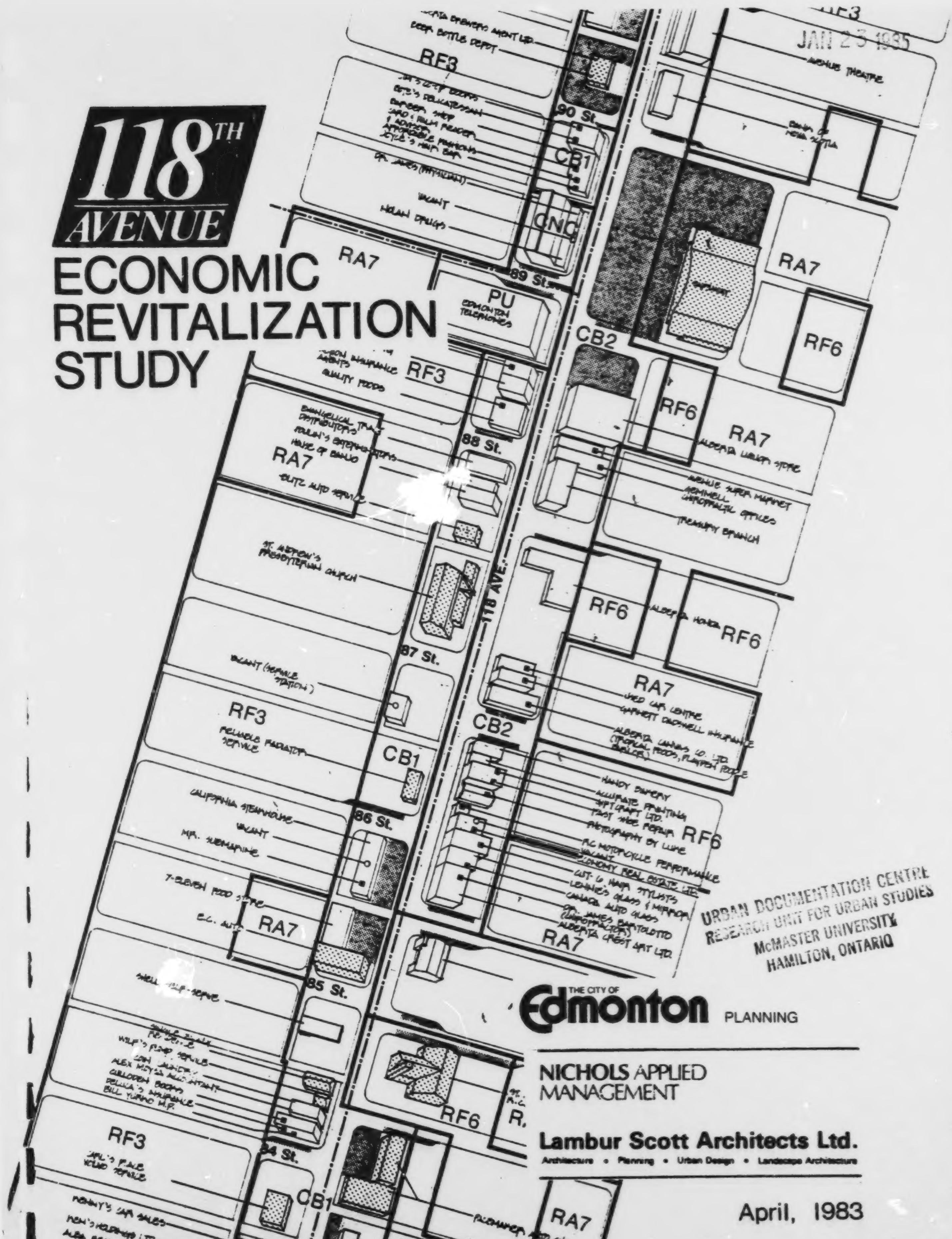
118TH AVENUE
ECONOMIC REVITALIZATION STUDY



BEER BOTTLE DEPOT
RF3
BETE'S DELICATESSEN
BARBER SHOP
AFFORDABLE FASHIONS
DR. JAMES (PHYSICIAN)
VACANT
NOLAN DRUGS
90 St.
CB1
CNC
RA7
89 St.
PU
EDMONTON TELEPHONES
CB2
AVENUE THEATRE
BANK OF NOVA SCOTIA
RA7
RF6
RF3
QUALITY FOODS
EVANGELICAL TRACT DISTRIBUTORS
HOUSE OF BANJO
RA7
BLITZ AUTO SERVICE
88 St.
RF6
RA7
ALBERTA LIQUOR STORE
AVENUE SUPER MARKET
CHIROPRACTIC OFFICES
TREASURY BRANCH
ST. ANDREW'S PRESBYTERIAN CHURCH
118 AVE.
RF6
ALBERTA HONDA
RF6
87 St.
VACANT (SERVICE STATION)
RA7
USED CAR CENTRE
ALBERTA CANNING CO. LTD.
RF3
RELIABLE RADIATOR SERVICE
CB2
CB1
HANDY BAKERY
ACCURATE PRINTING
FAST SHOE REPAIR
PHOTOGRAPHY BY LUKE
RF6
VACANT
ECONOMY REAL ESTATE LTD.
CALIFORNIA STEAKHOUSE
VACANT
MR. SUBMARINE
86 St.
LENNIE'S GLASS & MIRROR
CANADA AUTO GLASS
DR. JAMES BARTOLOTTO (CHIROPRACTORS)
ALBERTA CREST ART LTD.
7-ELEVEN FOOD STORE
E.C. AUTO
RA7
RA7
SHELL SELF-SERVE
85 St.
WILF'S PUMP SERVICE
ALEX MOYSA ACCOUNTANT
CULLODEN BOOKS
BILL YURKO M.P.
RF6
RF3
84 St.
CB1
RA7
KENNY'S CAR SALES
ALBA REAL ESTATE
RA7

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HAMILTON, ONTARIO

THE CITY OF Edmonton PLANNING

NICHOLS APPLIED
MANAGEMENT

Lambur Scott Architects Ltd.
Architecture • Planning • Urban Design • Landscape Architecture

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April, 1983

ACKNOWLEDGEMENTS

This report has been prepared for the City of Edmonton Planning Department by Nichols Applied Management and Lambur Scott Architects Ltd. with in-house assistance provided by Area Planning Branch staff.

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March 31, 1983

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Re: 118th Avenue Economic Revitalization Study

Dear Mr. Dolman:

We are pleased to submit herewith our final report summarizing our findings and recommendations with respect to the 118th Avenue Business Improvement Program.

The Economic Revitalization Study is intended as a first step towards the eventual implementation of an appropriate plan for the revitalization of one of Edmonton's oldest commercial areas and, as such, outlines the problems and prospects associated with such an undertaking.

Although the obstacles to the implementation of a meaningful revitalization effort are considerable, preliminary indications suggest that these may be overcome.

To date, the following initiatives have been undertaken: a B.I.P. coordinating committee (comprised of local business people and area residents) has been established; several businesses have enrolled in the Retail Management Assistance Program (administered through the Alberta Department of Tourism and Small Business); and arrangements have been made for a planning and urban design workshop conducted by local professionals contributing their services through Edmonton's newly established Design Workshop.

With the necessary enthusiasm, imagination, and dedication of its participants, the Business Improvement

...../2

Program can, over time, re-establish the strength and vitality of the 118th Avenue commercial district. This effort may indeed provide a model for other business communities, and perhaps give the necessary impetus to a provincially sponsored revitalization program similar to those administered by several provinces throughout Canada.

We are indebted to you and your Committee for your assistance in guiding the Economic Revitalization Study through to its successful conclusion, and wish to take this opportunity to acknowledge the special efforts extended by Mr. Mario Belvedere and Ms. Eva Wadolna of your Department, and of course Mr. Bill Chmiliar and Mr. Dick Bron of the East Edmonton Business Association.

Respectfully submitted,

NICHOLS APPLIED MANAGEMENT
LAMBUR SCOTT ARCHITECTS LTD.

Peter Nichols

Peter Lambur, M.R.A.I.C.

PL/dn

encl.

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EXECUTIVE SUMMARY

STUDY AREA PROFILE

The 118th Avenue commercial strip has provided an important retail and service function for residents in northeastern Edmonton and outlying areas since the early 1900's.

Over the past several years, the Avenue has been marked by the turnover in ownership and closure of many businesses, the lack of significant reinvestment or new investment in the area, the physical deterioration of the commercial shopping environment, increased competition from suburban shopping centres, and traffic and parking problems which limit the accessibility to businesses.

Factors contributing to this situation and that threaten the long-term viability of the 118th Avenue business district include:

- the continuing decline of 118th Avenue as the commercial heart of the northeast area;
- the length, and dispersed, fragmented nature of the business district;
- the lack of historically or physically unique features as the basis for a revitalization theme;
- the adverse socio-economic conditions and trends in surrounding residential neighborhoods;
- the absence of a strong existing and cohesive organization of merchants and property owners;

- the limited availability of local financial and management resources, in part due to the size, tenure, and other characteristics of the commercial businesses.

118TH AVENUE BUSINESS IMPROVEMENT PROGRAM

In response to the concerns regarding the future of 118th Avenue, agreement was reached between the East Edmonton Business Association, representing many business operators in the area, and the City of Edmonton to begin the development of a Business Improvement Program. The purpose of the Program is to stimulate the economic revitalizaton of the 118th Avenue commercial strip.

PURPOSE OF THIS STUDY

As an initial phase of the Business Improvement Program (B.I.P.), the '118th Avenue Economic Revitalization Study' was commissioned in late 1982. The intent of the study is to analyze the economic, social, and physical problems of the commercial strip and to formulate preliminary strategies and action plans for its revitalization.

STUDY METHODOLOGY

During the course of the study a considerable amount of data was collected pertaining to the physical structure of the study area, transportation and parking considerations, the business community, adjoining residential neighborhoods and the 118th Avenue shoppers. Data collection included a thorough review of background documents supplemented by discussions with City planning staff. Original research included field investigations and physical inventories, and surveys of households, shoppers, and merchants in the study area. The information thus obtained was evaluated and formed the basis for a proposed development strategy and action plan recommendations.

FUTURE PROSPECTS

In the absence of Business Improvement Program measures, it is concluded that no fundamental changes in the physical character or shopping dynamics of the 118 Avenue business district can be anticipated. The continuation of past trends and existing commercial function of the study area under a "no-improvement" scenario is, however, considered to be unacceptable to local residents and merchants.

To effect positive changes in the study area, it is apparent that some mix of initiatives or improvements will be required.

RECOMMENDED ACTION PLAN

To direct future revitalization efforts, a comprehensive seven-point action plan for the 118th Avenue business and shopping area is proposed. The action plan requires that the various business interests along the Avenue work cooperatively in the following areas:

- Organization
- Promotion
- Education
- Investigation
- Planning
- Implementation
- Management

A strong, cohesive, and active ORGANIZATION representing both merchants and property owners is a necessary precondition to a successful Business Improvement Program. A separate committee within the East Edmonton Business Association should be established and its initial efforts directed to raising the interest and awareness of the business community in the Program and soliciting participation in B.I.P. committees and activities.

Once a representative organization is in place, a number of PROMOTIONAL activities should be vigorously pursued. A graphic symbol or logo could be designed to provide a focus for many of these promotional initiatives. The logo could be displayed on the masthead of B.I.P. newsletters and advertising supplements and used in various media advertising programs. Special events featuring sales promotions and discounts, entertainment, and other attractions should be considered as a means of promoting community use of local businesses. Facilities, programs and services should be developed for important market segments in the area (e.g. senior citizens, Coliseum-Northlands employees and patrons, lower income families, and ethnic households). A prospectus identifying business opportunities along 118th Avenue should be prepared and circulated to potential investors and developers, and an information brochure and map of the area could be distributed to area residents, nearby hotels, and tourist information offices.

Merchandising and management training and assistance can be extremely beneficial to small, independently operated businesses, which predominate in the study area. EDUCATIONAL programs can play an important part in a successful revitalization effort. The B.I.P. executive should sponsor workshops, seminars, and guest speakers as a 'continuing education' service to its membership. It might also take advantage of the Retail Management Assistance Program available at nominal cost through the Alberta Department of Tourism and Small Business.

As promotional and business development activities evolve, the B.I.P. committee should undertake various INVESTIGATIONS to assess the performance of marketing measures and to identify needed improvements. Neighborhood residents, shoppers, and local businesses should be periodically surveyed, special 'target' markets identified, and the potential for attracting specific types of new businesses to the area assessed.

The PLANNING of physical improvements, new developments, and beautification measures to improve the image of 118th Avenue, is another important component of the B.I.P. A 'development strategy' should be established in consultation with City officials and local neighborhood interest groups. This strategy must include a plan for proposed physical improvements, measures for improving access to shopping and parking, and a consideration of available planning options for implementation. As a preliminary guide, five potential sub-areas are identified in the report as focal points for revitalization. The length and uneven development fabric of the 118th Avenue business area necessitates a selective revitalization effort focussed on sub-areas exhibiting special characteristics and development potential.

The actual IMPLEMENTATION of proposed physical improvements will follow the acceptance of planning recommendations by the B.I.P. membership. The scope and timing of these will depend upon the financial support available, and is directly related to the success of the promotional and marketing efforts previously described.

On-going MANAGEMENT is the last step in the prescribed action plan. The B.I.P. organization may well require a number of special sub-committees to deal with promotion, marketing, planning, and other activities on an on-going basis. These functions could be centralized in a B.I.P. 'storefront office' along 118th Avenue, which could also serve as a community information centre. Monitoring the effectiveness of the Program in all its aspects will provide the basis for re-adjusting promotional, marketing, and improvement plans to meet future needs.

NEXT STEPS

Immediate steps that may be taken to assist in the implementation of the proposed action plan include the following:

- election of a B.I.P. Executive Coordinating Committee and development of programs to increase interest and awareness in the business community;
- continuation of the 118th Avenue B.I.P. Newsletter;
- design of a 118th Avenue logo or trademark;
- sponsorship of workshops to establish specific revitalization objectives;
- completion of a functional trasportation planning study of 118th Avenue to assist in defining long-term development opportunities related to the revitalization of 118th Avenue.

1. BACKGROUND AND OBJECTIVES OF THE STUDY

The 118 Avenue commercial strip in northeast Edmonton dates back to the early 1900's. Since then, the business area has served an important retail and service function for residents in northeastern Edmonton and outlying areas.

Over the past several years there has been an increasing concern regarding the continued viability of businesses along the Avenue. The concerns expressed relate to: the turnover in ownership and closure of businesses; the lack of significant re-investment or new investment in the area; the physical deterioration of the commercial shopping environment; increased competition from suburban shopping centres; and traffic and parking problems which apparently limit accessibility to businesses. The net result is that a number of economic, social, and physical problems afflict the area and threaten its long term viability.

The East Edmonton Business Association, representing many business operators in the area, has requested assistance from the City in addressing the apparent problems of 118th Avenue. The City, in the context of the goals of its General Municipal Plan, is similarly concerned with improving the strength of established commercial areas such as the 118 Avenue business community.

Accordingly, agreement has been reached to begin the development of a Business Improvement Program for the area. The purpose of the Program is to stimulate the economic revitalization of the 118 Avenue commercial strip. Its thrust will be to explore and develop ways and means whereby the private sector can undertake various projects which, together with support and assistance from the City, will lead to the rehabilitation of one of our City's oldest commercial streets.

The program framework has several components, as indicated below:

- establishment of an organizational vehicle and the necessary local support to execute the Program
- study and analysis of the problems and potential of the area
- strategies for business improvement
- promotional activities
- development of improvement projects
- drafting of enabling legislation (under Provincial jurisdiction) for Business Improvement Programs.

To date, some basic organizational arrangements for the Program have been established. The East Edmonton Business Association (E.E.B.A.), representing the businesses along the 118 Avenue commercial strip, will oversee the major private sector responsibilities. Staff from the City Planning Department will work in close consultation with the E.E.B.A. to identify the problems and potential of the area and to develop realistic strategies for planned improvements.

As an initial phase of the Business Improvement Program, a study of the problems and prospects for the 118 Avenue commercial strip has been commissioned. It is intended that this study will provide the basis for determining the strategies and action plans to revitalize commercial activities along 118 Avenue. More specifically, the study presents an analysis of the existing economic, social, and physical problems, and the potential of the commercial strip. Within this context, recommendations will also be provided with respect to the types of improvements and changes that may be required to improve the strip's economic vitality.

In October, 1982, a steering committee consisting of representatives from the E.E.B.A. and the City Planning Department selected the consultant team of NICHOLS APPLIED MANAGEMENT, Economic and Management Consultants, and LAMBUR SCOTT ARCHITECTS LTD., Architects and Planners, to undertake the 118th Avenue Economic Revitalization Study.

The report which follows outlines the findings of this first step in the 118th Avenue revitalization program.

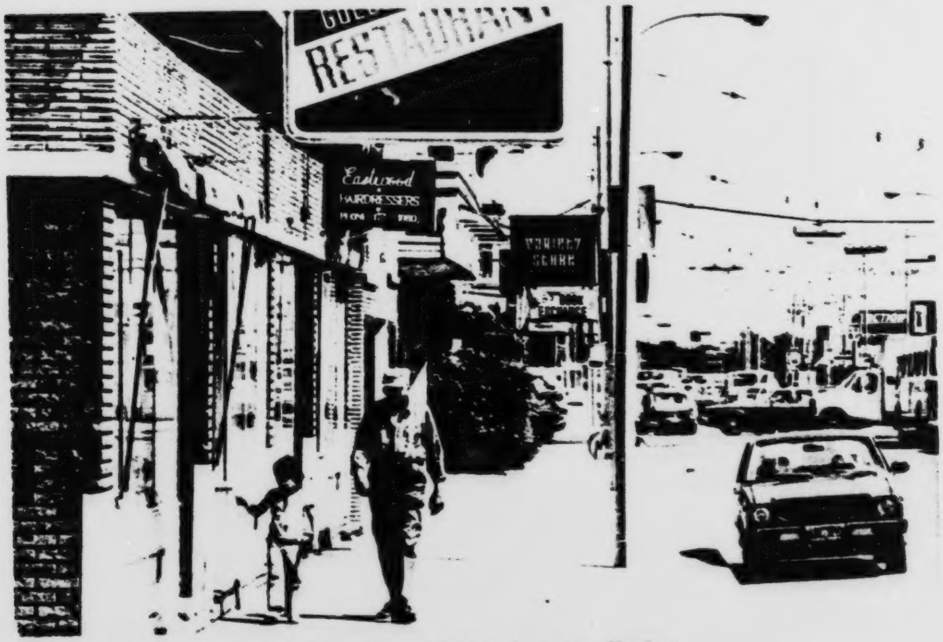


FIGURE 1 - 118th Avenue Today

2. STUDY APPROACH AND METHODOLOGY

During the course of the project, the study team reported to a Steering Committee comprised of representatives of the E.E.B.A. and the City Planning Department. Mr. Mario Belvedere of the City Planning Department served as Co-ordinator of the project. During the study, periodic meetings with members of the Steering Committee were arranged as required. In addition, three public meetings with representatives of the 118 Avenue business community were organized to discuss the project status, interim findings, and recommendations.

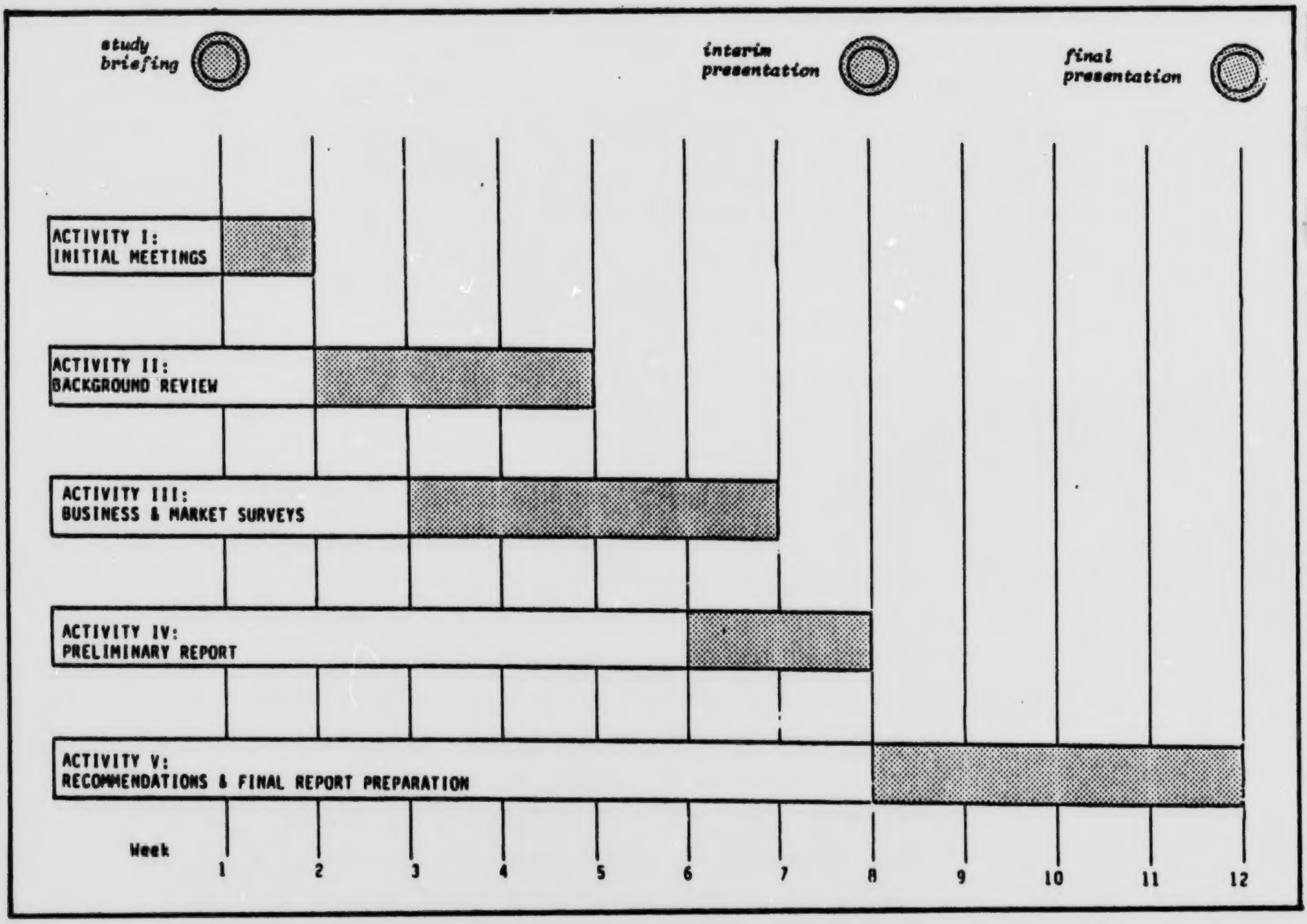
The major components of the study included the following:

- A review of background documents, discussions with City planning staff, various field investigations, and a physical inventory of the study area.

- The design and administration of household, shoppers, and business surveys in the study area. These surveys comprised the primary form of original data collection during the study. In December, 1982, all businesses along 118 Avenue were surveyed by questionnaire. In addition, approximately 2900 survey questionnaires were sent by mail to households in the 118 Avenue area. Finally, approximately 450 shoppers were interviewed along 118 Avenue over a three-day period.

- The evaluation and interpretation of the above data and information, and the development of recommendations.

FIGURE 2
STUDY PROGRAM



The final report document is organized in the following manner:

- Section 3 describes the general elements of a Business Improvement Program, with reference to established programs elsewhere in Canada.
- The study area encompassed by this project is defined in Section 4, and the evolution and physical structure of the area is described and assessed.
- Section 5 reviews the findings of the business, shoppers, and household surveys undertaken as part of the study, and examines the economic and market factors which impinge on the 118th Avenue business district.
- Section 6 summarizes the recommendations of the study team in terms of initiatives which may improve the vitality and viability of 118 Avenue.

The final chapter of the report discusses 'next steps', or the future activities which should be carried out as part of a longer-term Business Improvement Program.

The Appendices include the results of the three surveys carried out; project terms of reference; the study work program; excerpts from selected background studies; and a bibliography of source materials and information.

3. BUSINESS IMPROVEMENT PROGRAMS - AN OVERVIEW

A Business Improvement Program is perhaps best defined as a self-help mechanism for the promotion and revitalization of an area as a business or shopping area.

In a number of urban centres, the "downtown" (i.e. the central business district or major retail strip) may have lost its historical function as the principal retail area in its community. In many cases, the focus of retail activity has shifted to a nearby regional shopping centre or mall. In other instances, the retail focus may have moved to a geographically central downtown business district as a result of planning policies, market demand, and ease of access.

With this shift away from historic retail centres has come a decline in the economic viability of many smaller business areas as witnessed by: a rising number of vacancies; major gaps in the retail profile (as department stores, large discount and major food stores move out of the area); and, in some cases, physical deterioration of once prime shopping districts.

The impact of these trends has been significant enough to suggest that many retail areas cannot be restored to their traditional function and, therefore, must be helped to develop another role. Included in this role could be: secondary retail services, small specialized shops, and general services (eg. legal, medical, financial); community facilities and services; institutional uses; and some residential uses, perhaps included as components of mixed-use projects.

Towards realizing a new role, older retail areas must tackle the physical problems of comfort, convenience, attractiveness, ease of access, and parking. At a more fundamental level, management problems - resulting from a high number of individual land owners/tenants with a corresponding diversity of opinions regarding marketing objectives - must be resolved.

Business improvement and revitalization programs have been developed in many Provinces in response to the situation outlined above. Their common objective is to recapture social and economic values and restore visiting and shopping habits to levels commensurate with the new role of revitalized retail areas serving their respective communities.

Where is Legislation in Effect?

Business Improvement programs and revitalization efforts for the downtown areas of smaller communities and retail strips have been considered and studied in every province in the country. Legislation is currently in effect in Quebec, Ontario (where over 160 communities have benefited), Saskatchewan, and Nova Scotia (where 45 centres have received assistance to date). Enabling legislation is currently being developed in the province of Prince Edward Island.

Have Existing Programs Achieved Their Objectives?

The success of revitalization efforts with respect to enhancing the economic viability of traditional retail centres is difficult to assess on a comparative basis. In some provinces where legislation is still relatively new, the jury is still out. Many centres in Ontario, however, claim significant benefits in terms of increased retail activity as a result of the implementation of a Business Improvement Program.

What Exactly is Involved in a Business Improvement Program?

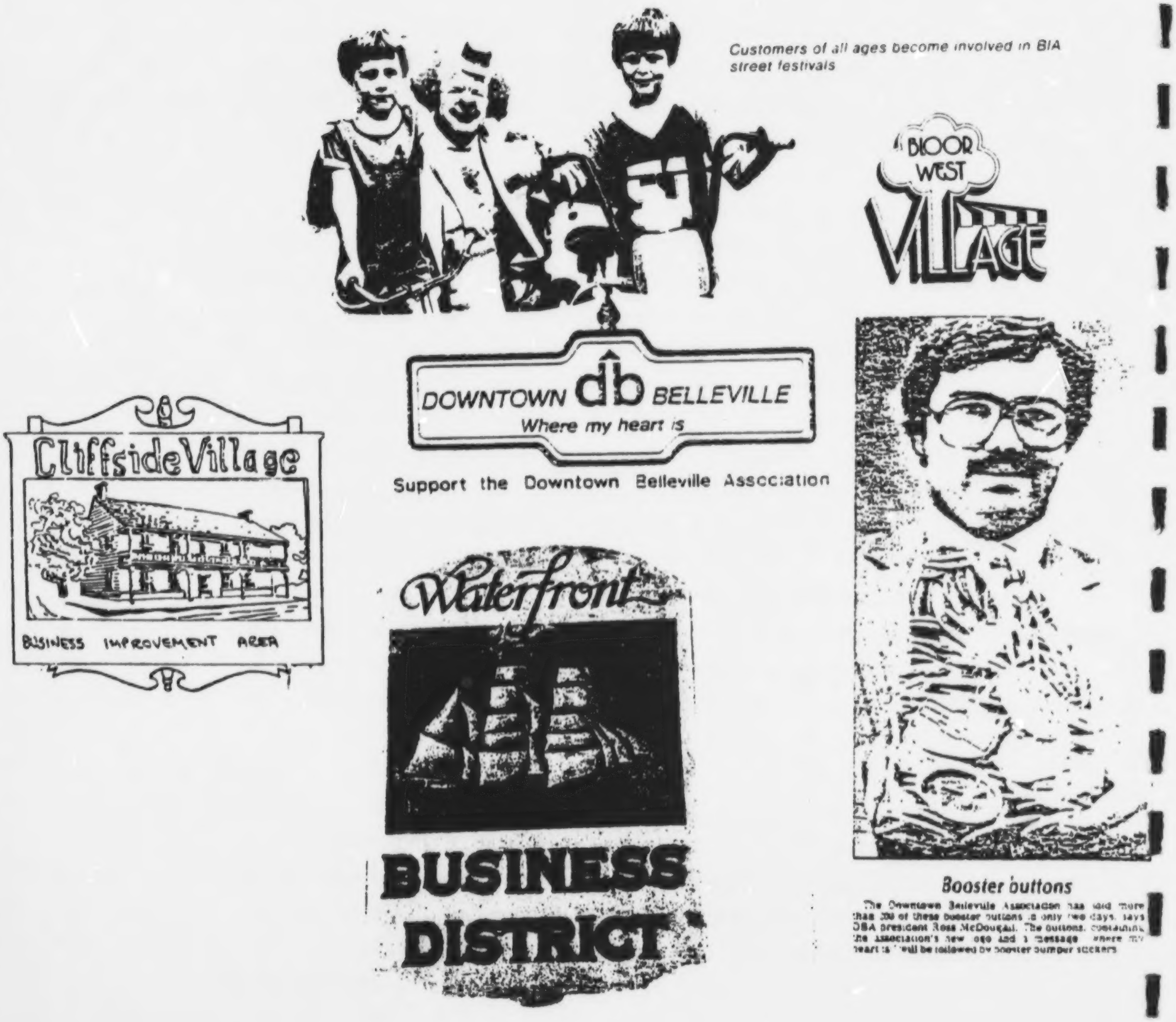
The basic elements common to all revitalization efforts across the country may be classified under three broad headings: organization; promotion marketing; and landscaping and beautification.

The organization and management of the Business Improvement area is perhaps the most critical and most powerful component of any revitalization effort. A strong organization can develop an effective promotional campaign that will help draw business back to the area. Successful promotional efforts are those that have been effectively targeted at both the business people in a business improvement area and the community at large via an ongoing program of promotional events that generate and sustain a feeling of excitement about the area. Business Improvement Programs provide perhaps the best environment for initiating a promotional campaign. Many efforts to date have made extensive use of the press, radio, and television for advertising upcoming events and plans, and many business improvement areas have developed distinctive logos and/or a theme as a focus for long term promotional efforts.

Marketing - the "selling" process - is an extension of promotional activities aimed at strengthening community shopping habits within a designated business improvement area. Critical to the marketing plan is a cohesive image of the business improvement area developed through advertising, physical improvements, etc. The most successful revitalization

FIGURE 3

B.I.A. LOGOS/PROMOTION


BLOOR WEST VILLAGE
DOWNTOWN db BELLEVILLE
Where my heart is
Cliffside Village
BUSINESS IMPROVEMENT AREA
Waterfront
BUSINESS DISTRICT

Customers of all ages become involved in BIA street festivals

Support the Downtown Belleville Association

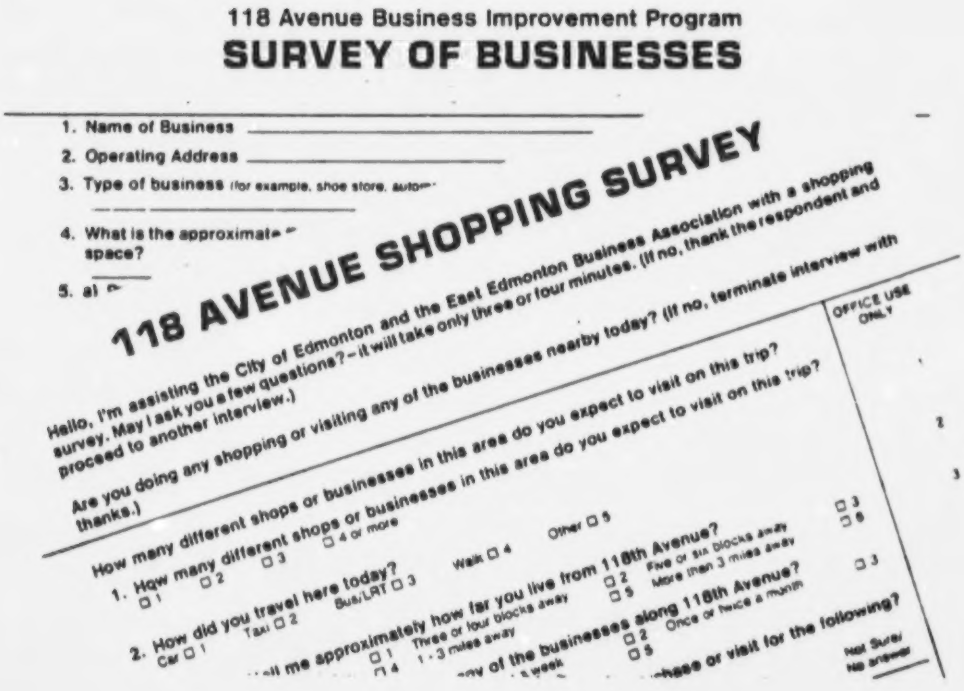
Booster buttons

The Downtown Belleville Association has sold more than 200 of these booster buttons in only two days, says DBA president Ross McDougall. The buttons, containing the association's new logo and a message "where my heart is" will be followed by booster bumper stickers.

efforts have also managed to establish uniform store hours and operating practices to strengthen the efficiencies and effectiveness of a shopping district. In this regard, market surveys are often undertaken to assess the performance of business improvement area as changes are made and promotional concepts tested. Surveys are also very valuable in helping to predict the viability of various proposals in advance of actual capital commitments.

FIGURE 4

SURVEYS - A VALUABLE MARKETING TOOL



118 Avenue Business Improvement Program

SURVEY OF BUSINESSES

1. Name of Business ____________________
2. Operating Address ____________________
3. Type of business (for example, shoe store, autom
4. What is the approximate
   space?
5. al

118 AVENUE SHOPPING SURVEY

Hello, I'm assisting the City of Edmonton and the East Edmonton Business Association with a shopping survey. May I ask you a few questions? – it will take only three or four minutes. (If no, thank the respondent and proceed to another interview.)

OFFICE USE ONLY

Are you doing any shopping or visiting any of the businesses nearby today? (If no, terminate interview with thanks.)

How many different shops or businesses in this area do you expect to visit on this trip?

1. How many different shops or businesses in this area do you expect to visit on this trip?
   ☐ 1 ☐ 2 ☐ 3 ☐ 4 or more
2. How did you travel here today?
   Car ☐ 1 Taxi ☐ 2 Bus/LRT ☐ 3 Walk ☐ 4 Other ☐ 5

ll me approximately how far you live from 118th Avenue?
☐ 1 Three or four blocks away ☐ 2 Five or six blocks away ☐ 3
☐ 4 1 - 3 miles away ☐ 5 More than 3 miles away ☐ 6

ny of the businesses along 118th Avenue?
a week ☐ 2 Once or twice a month ☐ 3
☐ 5

hase or visit for the following?

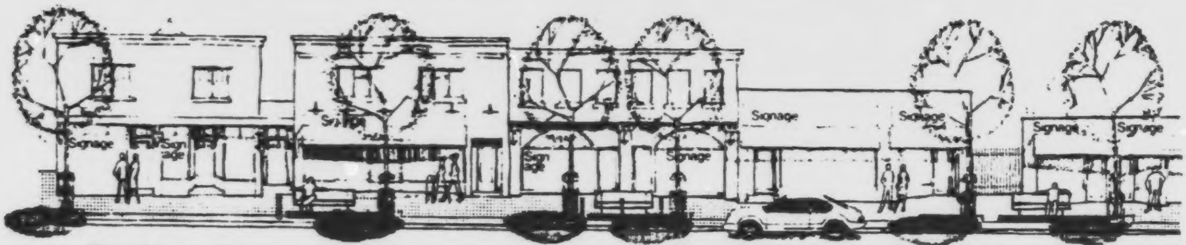
Not Sure/ No answer

The most visible element, though, of most Business Improvement Programs is the impact of landscape and beautification measures undertaken as part of any revitalization plan. It is generally held that physical improvements to the streetscape of a business improvement area will result in increased retail activity. Both business and government commitments to capital expenditures have seeded the revitalization of many centres and, most importantly, have helped to secure the viability of these centres for many years to come.

Some types of improvements that have been included in revitalization schemes are: new sidewalks and paved surfaces; street furniture including planters, benches, etc.; decorative street lighting; imaginative signage; the addition of stalls and kiosks; rehabilitation of pedestrian links to the main retail areas; improved directional signage; convenient and efficient parking proportional to the extent of development; fountains; awnings; and outdoor cafes. Often a campaign to refurbish and improve the store fronts in a business improvement area forms a major part of the beautification scheme.

FIGURE 5

WESTBORO B.I.A., OTTAWA - PROPOSED STREETSCAPE IMPROVEMENTS



Typical Streetscape

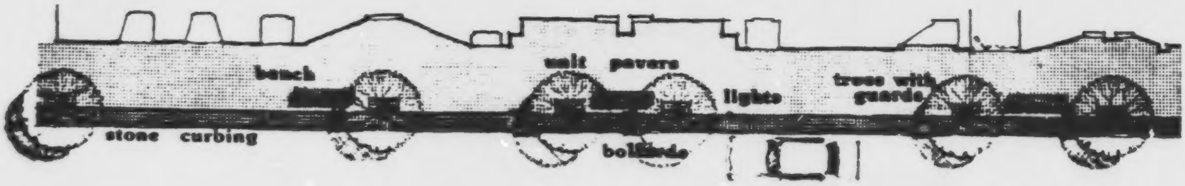
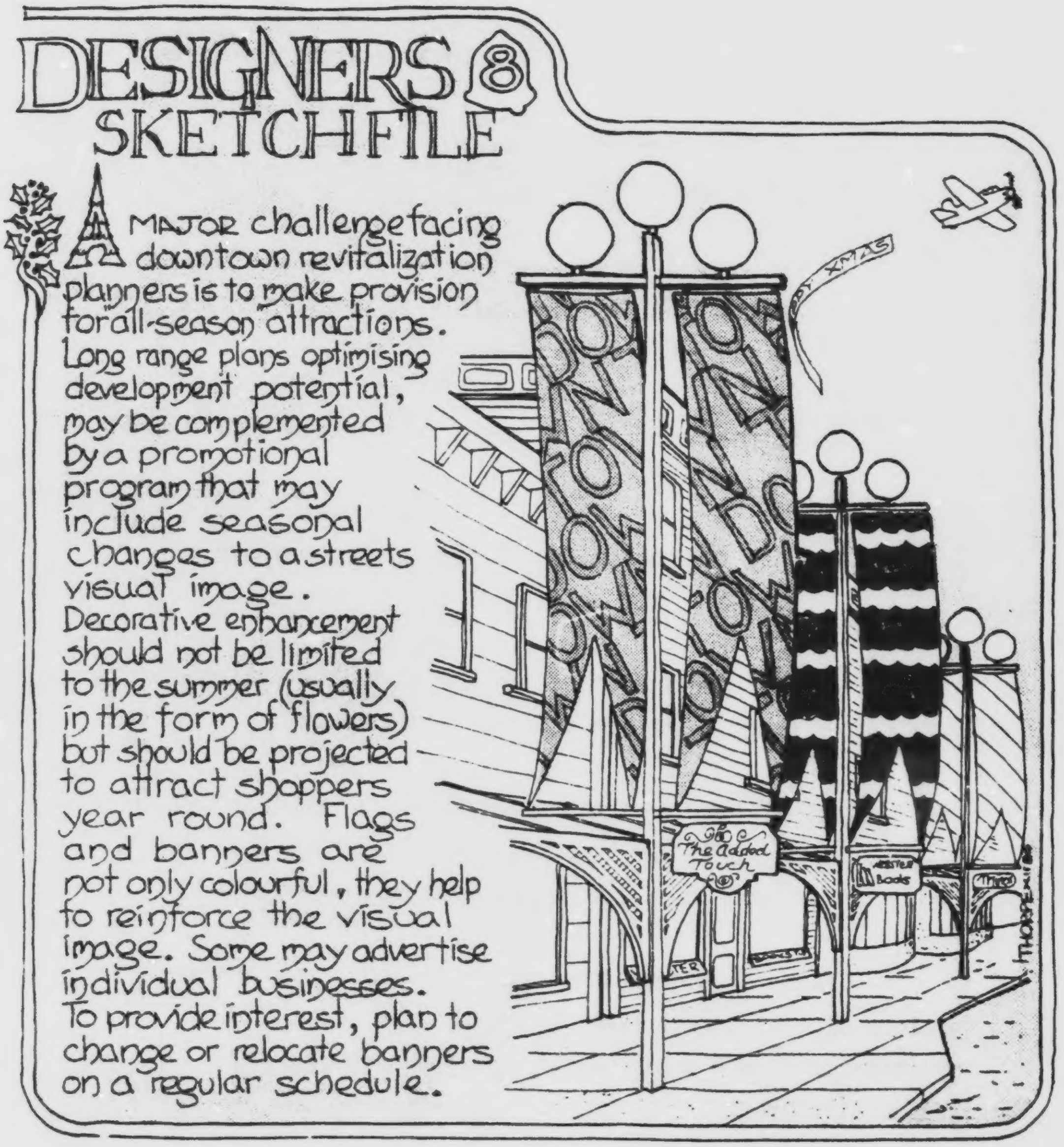


FIGURE 6

BEAUTIFICATION AS AN ONGOING PROCESS

(MAINSTREET NEWS - NOVA SCOTIA MAINSTREET PROGRAM)



DESIGNERS 8 SKETCHFILE

A MAJOR challenge facing downtown revitalization planners is to make provision for "all-season" attractions. Long range plans optimising development potential, may be complemented by a promotional program that may include seasonal changes to a streets visual image. Decorative enhancement should not be limited to the summer (usually in the form of flowers) but should be projected to attract shoppers year round. Flags and banners are not only colourful, they help to reinforce the visual image. Some may advertise individual businesses. To provide interest, plan to change or relocate banners on a regular schedule.

Is a Business Improvement Program Appropriate to the 118th Avenue Commercial Strip?

To answer this question, the following points should be considered:

- is there a need for a more efficient forum for the participation of all businesses within the area?
- is 118th Avenue unique, and are its special qualities marketable?
- is there a reasonable rate of investment in the area? (What is the profile of new business starts versus closures and bankruptcies?)
- is the potential market area sufficient to support area businesses?
- does the physical condition and appearance of the area need refurbishing?
- does the implementation of a revitalization program require joint public support?
- is there sufficient interest and momentum within the business community to support the self-help approach of a Business Improvement Program?

These considerations are addressed in subsequent sections of this report summarizing the research, field investigations, and analysis of the 118th Avenue commercial strip environment.

4. REVIEW AND ASSESSMENT OF STUDY AREA

4.1 THE STUDY AREA DEFINED

The study area, as defined in the B.I.P. terms of reference, flanks 118th Avenue (with 117th Avenue and 119th Avenue forming the south and north boundaries respectively) and extends from 77th Street to 97th Street. It is approximately 2.1 km in length, covering an area of 67 hectares.

The actual commercial land use component of the study area represents somewhat less than 30% of the total area, with existing residential land uses covering much of the balance of the study area, north and south of the relatively slender commercial spine.

Although perhaps it is not apparent at first glance, the boundaries delineating the study area do have some inherent logic. The inclusion of residential areas to the north and south of the 118th Avenue commercial land uses permit the development of planning guidelines and regulations that effectively accommodate both commercial and residential uses within the contiguous land parcels between 117th and 118th Avenues and 118th and 119th Avenues, respectively. The eastern boundary is also a logical limit to the prescribed study area, by virtue of a strong physical edge defined by the L.R.T. right-of-way and the Northlands (exhibition grounds) complex immediately adjacent. To a lesser extent, 97th Street - the western boundary of the study area - forms a natural physical barrier as a major north south traffic artery. Furthermore, the N.A.I.T. campus and Municipal airport beyond represent a significant change in the texture and type of land use patterns flanking 118th Avenue west of 97th Street.

Figure 7, abstracted from the City of Edmonton's General Municipal Plan, shows the study area in relation to the central business district, and other commercial strips and major shopping centres in Edmonton (pre-annexation). Figure 8 shows the 118th Avenue business improvement area at progressively larger scales within the context of its immediate inner-city urban environs.

FIGURE 7

STUDY AREA - COMMERCIAL CONTEXT

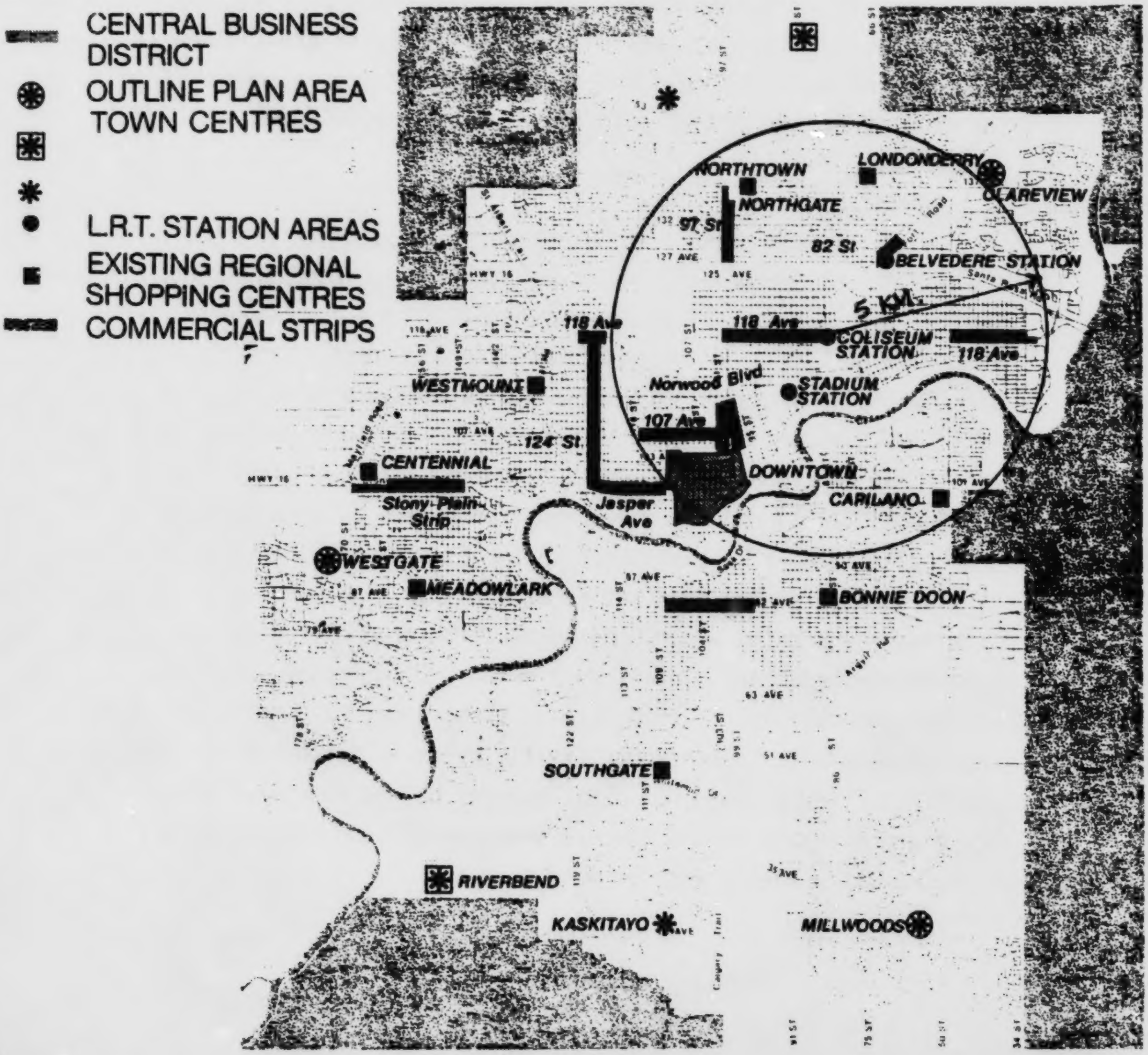
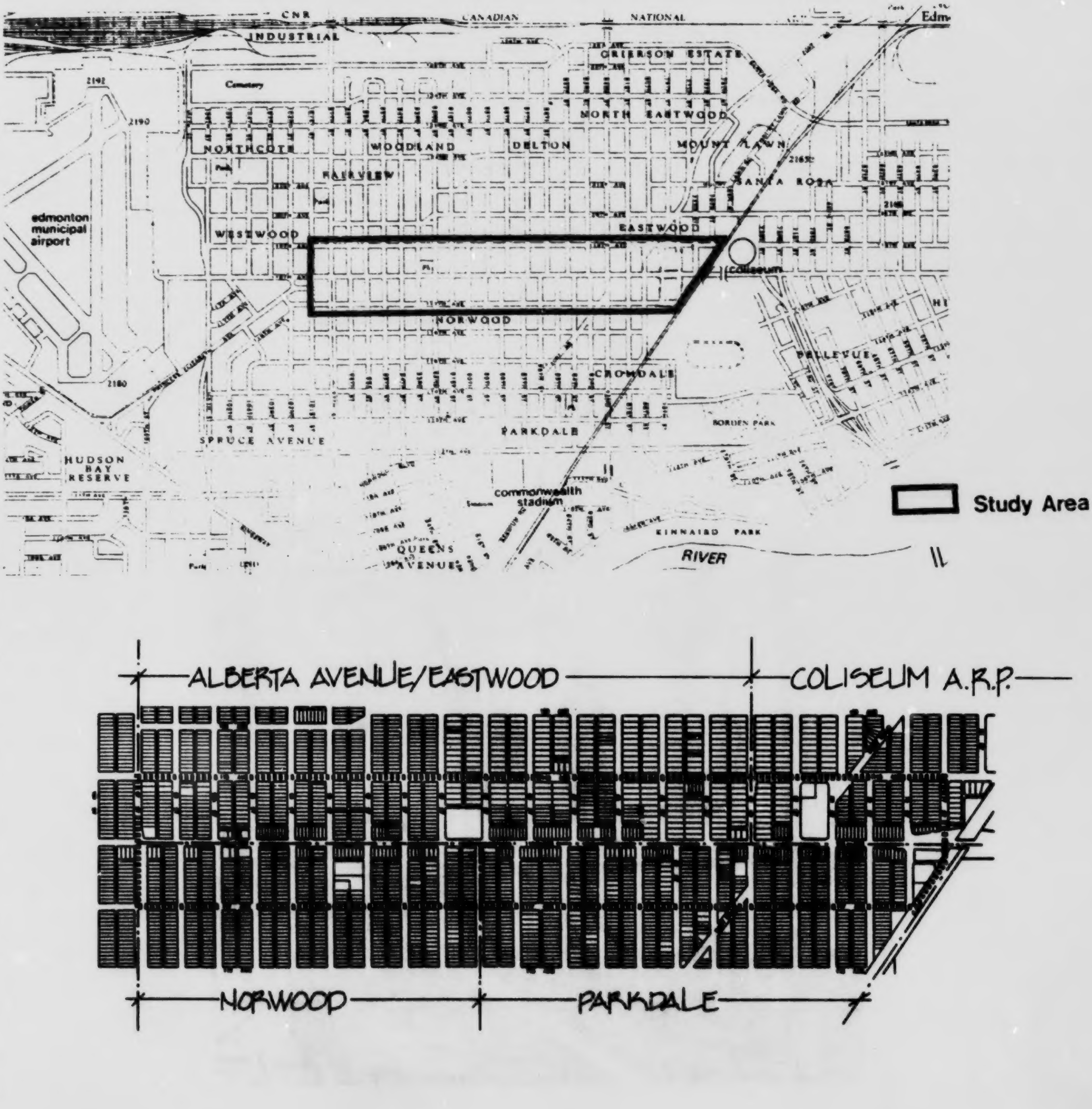

CENTRAL BUSINESS DISTRICT
OUTLINE PLAN AREA TOWN CENTRES
L.R.T. STATION AREAS
EXISTING REGIONAL SHOPPING CENTRES
COMMERCIAL STRIPS
NORTHTOWN
LONDONDERRY
CLAREVIEW
NORTHGATE
97 St
82 St
BELVEDERE STATION
5 KM.
118 Ave
118 Ave
118 Ave
COLISEUM STATION
WESTMOUNT
Norwood Blvd
STADIUM STATION
107 Ave
124 St
CENTENNIAL
DOWNTOWN
Stony Plain Strip
Jasper Ave
CAPILANO
WESTGATE
MEADOWLARK
BONNIE DOON
SOUTHGATE
RIVERBEND
KASKITAYO
MILLWOODS
HWY 16
127 AVE
125 AVE
118 AVE
107 AVE
101 AVE
90 AVE
87 AVE
82 AVE
79 AVE
63 AVE
51 AVE
35 AVE
170 ST
149 ST
142 ST
107 ST
97 ST
122 ST
119 ST
113 ST
111 ST
109 ST
104 ST
103 ST
99 ST
91 ST
75 ST
50 ST
34 ST
Calgary Trail

FIGURE 8

STUDY AREA - NEIGHBORHOOD CONTEXT

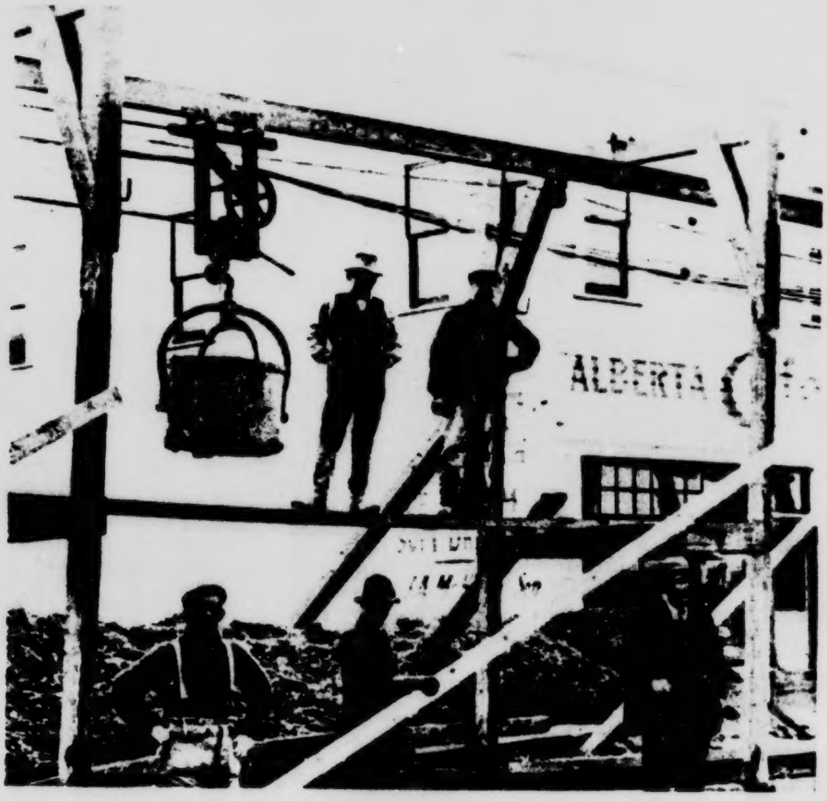

CNR
CANADIAN
NATIONAL
Edm
INDUSTRIAL
GRIERSON ESTATE
Cemetery
NORTH EASTWOOD
NORTHCOTE
WOODLAND
DELTON
MOUNT LAWN
FAIRVIEW
SANTA ROSA
edmonton municipal airport
WESTWOOD
EASTWOOD
coliseum
NORWOOD
BELLEVUE
CROMDALE
BORDEN PARK
SPRUCE AVENUE
PARKDALE
HUDSON BAY RESERVE
commonwealth stadium
QUEENS AVENUE
KINNAIRD PARK
RIVER
Study Area
ALBERTA AVENUE/EASTWOOD
COLISEUM A.R.P.
NORWOOD
PARKDALE

4.2 HISTORY AND EVOLUTION OF 118th AVENUE

The 118th Avenue commercial area strip began life as the 'mainstreet' of northeast Edmonton in the early 1900's. At that time, it served as the commercial hub for the new neighbourhoods established at the outskirts of the City. 'Alberta Avenue', as it was then known, continued to serve an important function as a regional shopping node, providing a variety of retail services for residents in northeast Edmonton, as the City continued to grow. To this day, 'Alberta Avenue' still retains many historic associations with the early development of Edmonton. However, little remains of its original physical fabric.

FIGURE 9

ALBERTA AVENUE (1914) (circa 1920-30)



The period of rapid urban growth in Edmonton beginning in the 1950's brought the former suburbs into the inner city, and irrevocably altered the regional service role of 118th Avenue. Although it has benefited from its location along a major traffic thoroughfare, the 118th Avenue business community has, in fact, changed its retail orientation from a 'main street' type commercial unit to a more specialized commercial strip type of development. In the process, which was largely unplanned, its former qualities and attractions were either severely compromised or totally pre-empted by external development pressures and new commercial retailing concepts. The classic deterioration of inner-city commercial main street areas was well advanced even before the advent of the surburban shopping centre and its successor, the large regional shopping centre.

With the introduction of new modern shopping centres in the 60's and 70's, the 118th Avenue area continued its decline, with businesses finding it increasingly difficult to compete under the burden of inadequate parking, traffic congestion, poor accessibility, and a deteriorating physical environment relative to its modern shopping centre counterpart. Although the present day commercial strip still plays an important role in the life of the neighbouring communities, its long-term viability as a commercial unit is in danger of yet further deterioration. The communities to which 118th Avenue is in a sense the 'front yard' have successfully lobbied to limit the expansion or diversification of commercial land uses to the extent that incentives and attractions for private sector development initiatives have been virtually eliminated. Options for future revitalization are presently dictated by the terms of the neighbourhood plans prepared for the surrounding communities. These plans have the effect of segregating the commercial unit into neighbourhood-related parcels. The problem is further exacerbated by current transportation planning policies which envisage an 'upgrading' of 118th Avenue to a multi-lane divided arterial. It should be noted, however, that the construction of the major east/west Yellowhead corridor north of 118th Avenue may ultimately prove the proposed upgrading unnecessary.

In recent years, attempts have been made to improve the parking situation along 118th Avenue. In 1978, a report prepared by the City of Edmonton Planning Department proposed the development of off-street parking facilities to contain the 'spill over' of commercial parking into the adjacent residential areas. The capital cost of implementing this scheme was deemed to be excessive and thus the proposal was rejected. Despite more recent efforts to redress the parking situation, it is still perceived by many businessmen and area residents as a major obstacle to the future revitalization of 118th Avenue.

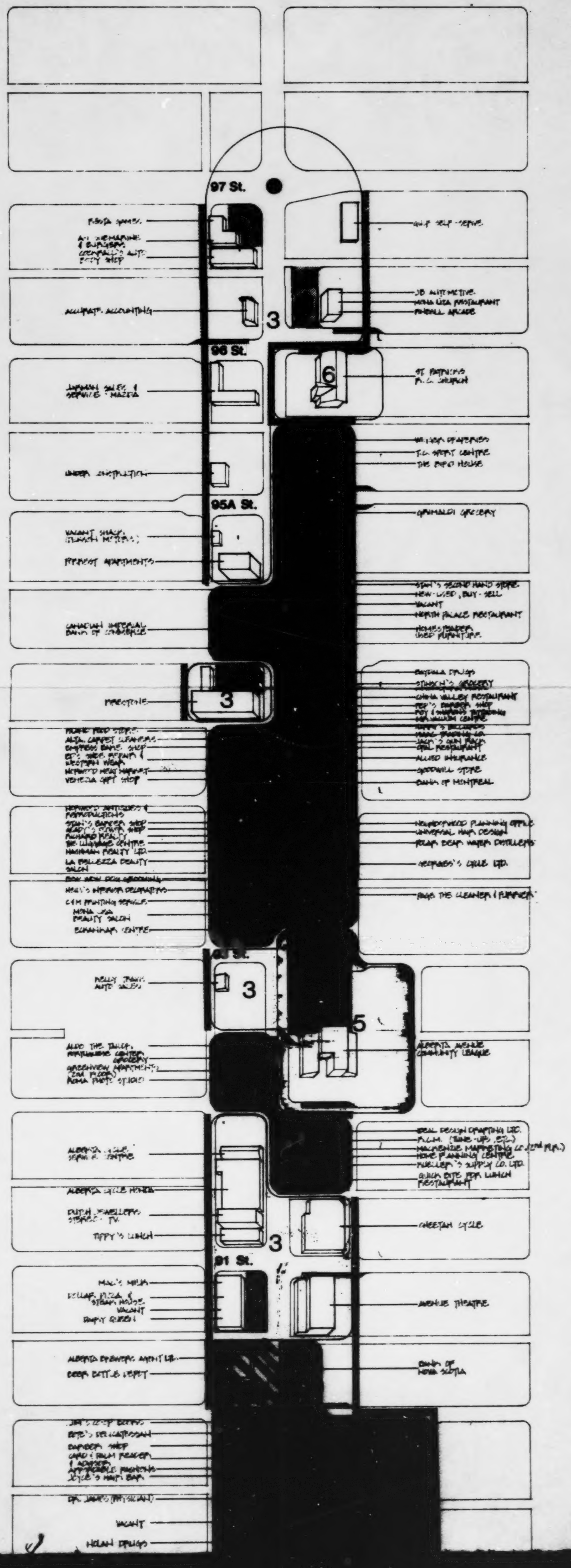
4.3 PHYSICAL STRUCTURE

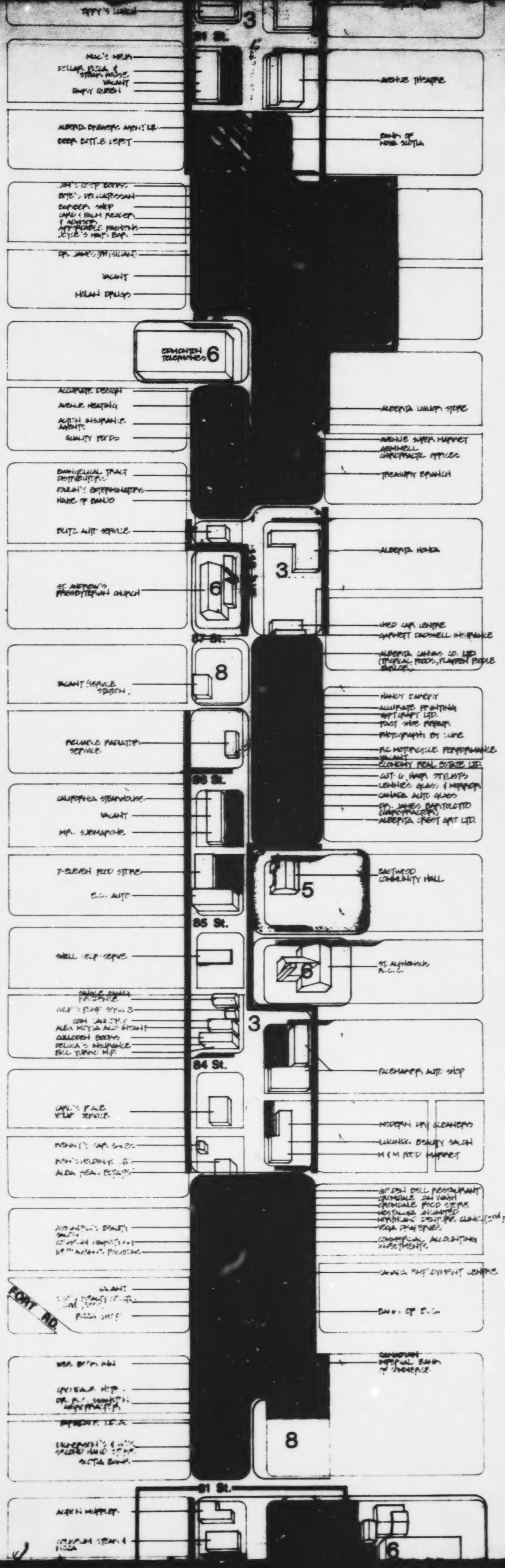
Perhaps the most significant influence on future development of the 118th Avenue commercial area is the pattern of land uses and urban form defining the character of the area today. An analysis of the existing form of development offers perhaps the best clues towards establishing a rationale for the redevelopment, rehabilitation, or preservation of all or part of the 118th Avenue strip.

Figure 10 provides a graphic summary of the current form and character of the commercial strip, and identifies sub-areas of more or less homogenous use, character, and form according to the land use function categories noted.

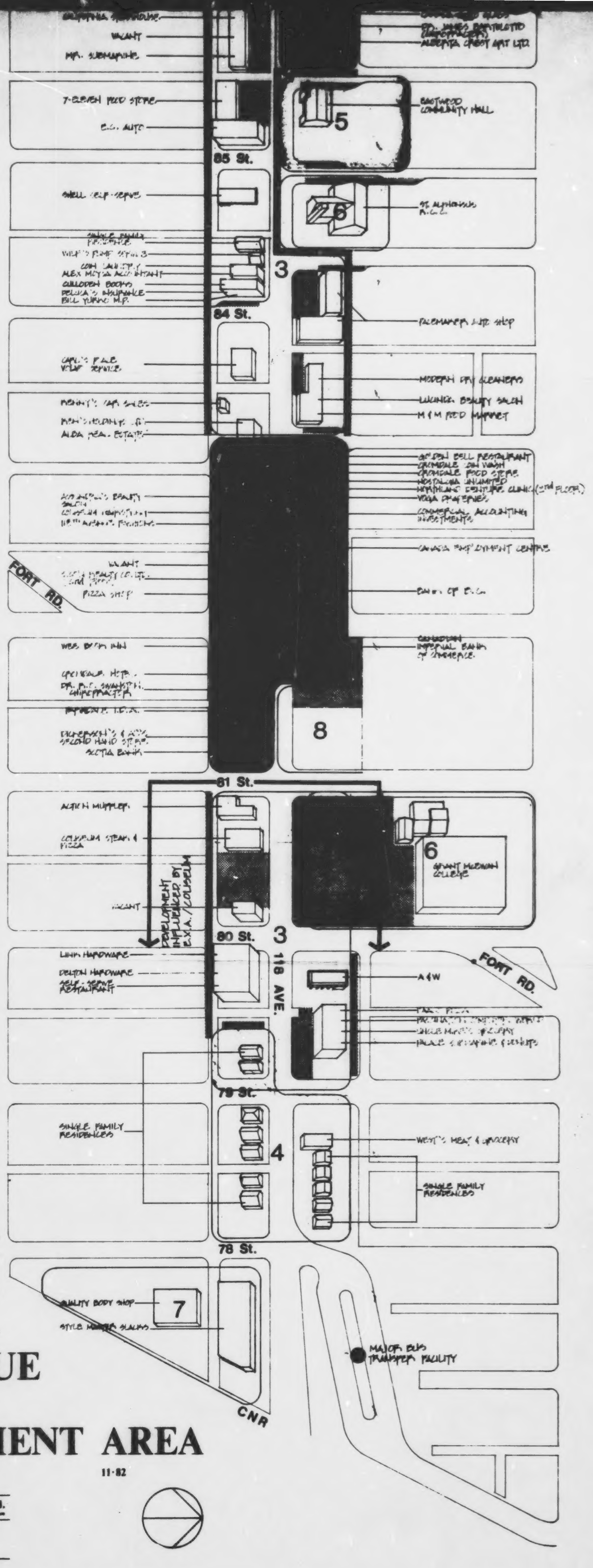
The overall pattern reveals a predominance of auto-oriented commercial strip type development and 'main street' commercial development representing the historically predominant form of commercial development along the avenue. Interspersed among the two major forms of commercial development are some large institutional and community recreation land parcels. Some minor residential, industrial, and vacant marginal site units round out the mix of land uses. In sum, the land use pattern is characterized by discontinuous commercial development with intervening non-commercial land uses that are functionally and aesthetically incompatable with their neighbours in most cases. Furthermore, many of 118th Avenue's commercial sub-areas are too small in size to function effectively as independent commercial units because of the constraints placed on their growth and the general devolution of the once prime commercial area to a low-order goods and services multi-functional strip. Its various component parts are only tenuously bound by a common orientation to the main circulation spine (118th Avenue) itself.

The physical structure of the present day commercial strip is described in more detail by sub-area on the following pages.


97 St.
96 St.
95A St.
91 St.
3
6
5
FIESTA HOMES
A-1 SUBMARINE & BURGERS
GRENFELL'S AUTO BODY SHOP
GULF SELF-SERVE
ACCURATE ACCOUNTING
JB AUTOMOTIVE
MONA LISA RESTAURANT
PINBALL ARCADE
JARMAN SALES & SERVICE - MAZDA
ST. PATRICK'S R.C. CHURCH
UNDER CONSTRUCTION
WILSON DRAPERIES
T.C. SPORT CENTRE
THE BIRD HOUSE
GRIMALDI GROCERY
VACANT SHACK (CLASSIC MOTORS)
PREVOST APARTMENTS
STAN'S SECOND HAND STORE
NEW-USED, BUY-SELL
VACANT
NORTH PALACE RESTAURANT
HOMESTEADER USED FURNITURE
CANADIAN IMPERIAL BANK OF COMMERCE
FIRESTONE
BATTALA DRUGS
STANICH'S GROCERY
CHINA VALLEY RESTAURANT
PEP'S BARBER SHOP
VACUUM CENTRE
JACK'S GUN RACK
OPAL RESTAURANT
ALLIED INSURANCE
GOODWILL STORE
BANK OF MONTREAL
ALTA. CARPET CLEANERS
EMPRESS GAME SHOP
ED'S SHOE REPAIR & WESTERN WEAR
VENEZIA GIFT SHOP
REPRODUCTIONS
STAN'S BARBER SHOP
RICHARD REALTY
THE LUGGAGE CENTRE
LA BELLEZZA BEAUTY SALON
C & M PRINTING SERVICE
MONA LISA BEAUTY SALON
NEIGHBOURHOOD PLANNING OFFICE
UNIVERSAL HAIR DESIGN
POLAR BEAR WATER DISTILLERS
GEORGES'S CYCLE LTD.
THE CLEANER & FURRIER
KELLY TRANS. AUTO SALES
ALDO THE TAILOR
PORTUGUESE CENTER GROCERY
GREENVIEW APARTMENTS (2ND FLOOR)
ROMA PHOTO STUDIO
ALBERTA AVENUE COMMUNITY LEAGUE
IDEAL DESIGN DRAFTING LTD.
P.C.M. (TUNE-UPS, ETC.)
MACKENZIE MARKETING CO. (2ND FLR.)
HOME PLANNING CENTRE
MUELLER'S SUPPLY CO. LTD.
QUICK BITE FOR LUNCH RESTAURANT
ALBERTA CYCLE HOUSE
DUTCH JEWELLERS STEREO - TV
TIPPY'S LUNCH
CHEETAH CYCLE
MAC'S MILK
DOLLAR PIZZA & STEAK HOUSE
VACANT
DAIRY QUEEN
AVENUE THEATRE
ALBERTA BREWERS AGENT LTD.
BEER BOTTLE DEPOT
BANK OF NOVA SCOTIA
BETE'S DELICATESSAN
BARBER SHOP
CARD & PALM READER & ADVISOR
AFFORDABLE FASHIONS
JOYCE'S HAIR BAR
DR. JAMES (PHYSICIAN)
VACANT
NOLAN DRUGS



TIFFY'S LUNCH
3
MAC'S MILK
DOLLAR PIZZA & STEAK HOUSE
VACANT
DAIRY QUEEN
AVENUE THEATRE
ALBERTA BREWERS AGENT LTD.
BEER BOTTLE DEPOT
BANK OF NOVA SCOTIA
BARBER SHOP
CARD & PALM READER & ADVISOR
AFFORDABLE FASHIONS
JOYCE'S HAIR BAR
DR. JAMES (PHYSICIAN)
VACANT
NOLAN DRUGS
EDMONTON TELEPHONES
6
ACCURATE DESIGN
AVENUE HEATING
ACTION INSURANCE AGENTS
QUALITY FOODS
ALBERTA LIQUOR STORE
AVENUE SUPER MARKET
GEMMELL CHIROPRACTIC OFFICES
TREASURY BRANCH
EVANGELICAL TRACT DISTRIBUTORS
HOUSE OF BANJO
BLITZ AUTO SERVICE
ALBERTA HONDA
3
ST. ANDREW'S PRESBYTERIAN CHURCH
6
USED CAR CENTRE
GARNETT DADSWELL INSURANCE
ALBERTA CANVAS CO. LTD. (TROPICAL FOODS, PLANTEN PICKLE PARLOR)
87 St.
8
VACANT SERVICE STATION
HANDY EATERY
ACCURATE PRINTING
ARTCRAFT LTD.
FAST SHOE REPAIR
PHOTOGRAPHY BY LUKE
RC MOTORCYCLE PERFORMANCE
VACANT
ECONOMY REAL ESTATE LTD.
CUT & HAIR STYLISTS
LENNIE'S GLASS & MIRROR
CANADA AUTO GLASS
DR. JAMES BARTOLOTTO (CHIROPRACTOR)
ALBERTA CREST ART LTD.
RELIABLE RADIATOR SERVICE
86 St.
CALIFORNIA STEAKHOUSE
VACANT
MR. SUBMARINE
7-ELEVEN FOOD STORE
E.C. AUTO
EASTWOOD COMMUNITY HALL
5
85 St.
SHELL SELF-SERVE
ST. ALPHONSUS R.C.C.
6
COIN LAUNDRY
ALEX MCTIE ACCOUNTANT
CULLODEN BOOKS
DELUCA'S INSURANCE
BILL YURKO M.P.
3
84 St.
PACEMAKER AUTO SHOP
MODERN DRY CLEANERS
LUCINES BEAUTY SALON
M & M FOOD MARKET
GOLDEN BELL RESTAURANT
NOSTALGIA UNLIMITED
VOGA PHARMACIES
COMMERCIAL ACCOUNTING INVESTMENTS
CANADA EMPLOYMENT CENTRE
VACANT
PIZZA SHOP
FORT RD.
BANK OF B.C.
CANADIAN IMPERIAL BANK OF COMMERCE
SECOND HAND STORE
SCOTIA BANK
8
6


GRIFFITHS SMOKEHOUSE
VACANT
MR. SUBMARINE
7-ELEVEN FOOD STORE
E.C. AUTO
85 St.
SHELL SELF-SERVE
SINGLE FAMILY RESIDENCE
WILF'S PUMP STN. 3
COIN LAUNDRY
ALEX MCY'S ACCOUNTANT
CULLODEN BOOKS
PELUKA'S INSURANCE
BILL YURKO M.P.
84 St.
CARL'S P.&B. VCUP SERVICE
BENNY'S CAR SALES
ALDA REAL ESTATE
ST. JAMES BARTOLOTTO (CHIROPRACTOR)
ALBERTA CREST ART LTD.
EASTWOOD COMMUNITY HALL
5
ST. ALPHONSUS R.C.C.
6
3
PACEMAKER AUTO SHOP
MODERN DRY CLEANERS
LUCINDA BEAUTY SALON
M & M FOOD MARKET
GOLDEN BELL RESTAURANT
CROMDALE COIN WASH
CROMDALE FOOD STORE
NOSTALGIA UNLIMITED
NORTHLAND DENTURE CLINIC (2ND FLOOR)
VOGA DRAPERIES
COMMERCIAL ACCOUNTING INVESTMENTS
CANADA EMPLOYMENT CENTRE
BANK OF B.C.
CANADIAN IMPERIAL BANK OF COMMERCE
SALON
118TH AVENUE FASHIONS
FORT RD.
VACANT
PIZZA SHOP
WEE BEAN INN
CROMDALE HOTEL
DR. R.C. SWANSTON, CHIROPRACTOR
DICKERSON'S & ANN'S SECOND HAND STORE
SCOTIA BANK
8
81 St.
ACTION MUFFLER
COLISEUM STEAK & PIZZA
VACANT
DEVELOPMENT INFLUENCED BY E.X.A. / COLISEUM
6
GRANT McEWAN COLLEGE
80 St.
3
118 AVE.
LINK HARDWARE
DELTON HARDWARE
SELF-SERVE RESTAURANT
A & W
FORT RD.
SINGLE MAN'S SPECIALTY
79 St.
SINGLE FAMILY RESIDENCES
4
WEST'S MEAT & GROCERY
SINGLE FAMILY RESIDENCES
78 St.
QUALITY BODY SHOP
7
STYLE MASTER SLALOMS
MAJOR BUS TRANSFER FACILITY
CNR

LEGEND

● MAJOR ACTIVITY NODES

LAND USE CHARACTER/FUNCTION

■ 'MAIN STREET' COMMERCIAL

■ NEIGHBOURHOOD SHOPPING CENTRE

3 AUTO-ORIENTED COMMERCIAL STRIP

4 RESIDENTIAL

5 COMMUNITY RECREATION

6 INSTITUTIONAL

7 INDUSTRIAL

8 TRANSITORY/MARGINAL

▬ CONFLICT/INCOMPATIBILITY WITH ADJACENT LAND USES.

FORM & CHARACTER ANALYSIS

118th AVENUE BUSINESS IMPROVEMENT AREA

0 5 20 40 80m

11-82

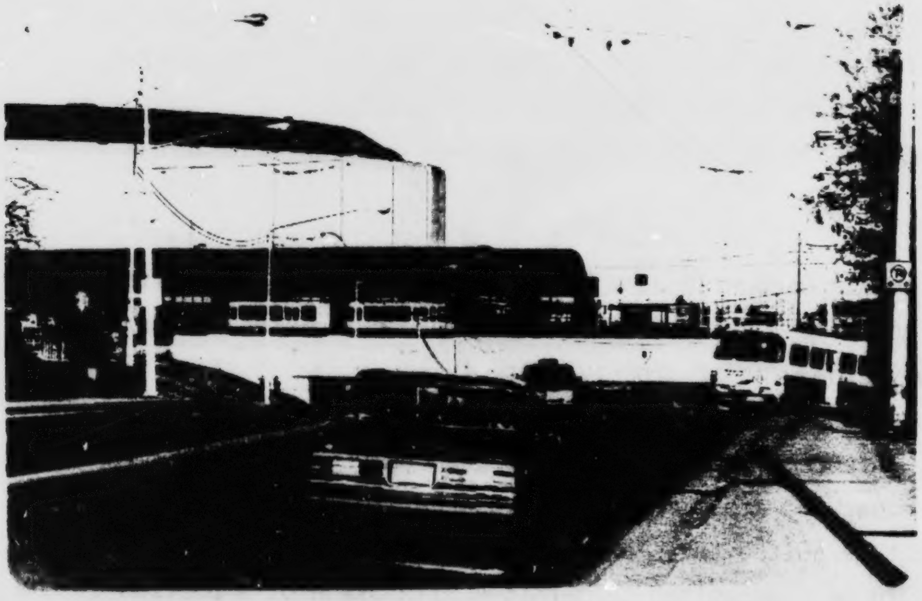
Lambor Scott Architects Ltd.

[illegible]

Beginning at the eastern terminus of the study area, 118th Avenue is flanked by a major bus transfer facility (associated with the nearby Coliseum L.R.T. station) to the north, and by a large manufacturing plant to the south. Because of the proximity of this 'eastern gateway' to the L.R.T. line, previous planning studies have recommended medium to high density redevelopment (primarily of a commercial nature) on both sites. However, the high cost of air rights development above the bus transfer facility coupled with the barriers to vehicular and pedestrian movement created by the approach to the L.R.T. underpass, largely preclude the likelihood of any major projects being undertaken in the foreseeable future.

FIGURE 11

THE EASTERN TERMINUS OF THE STUDY AREA



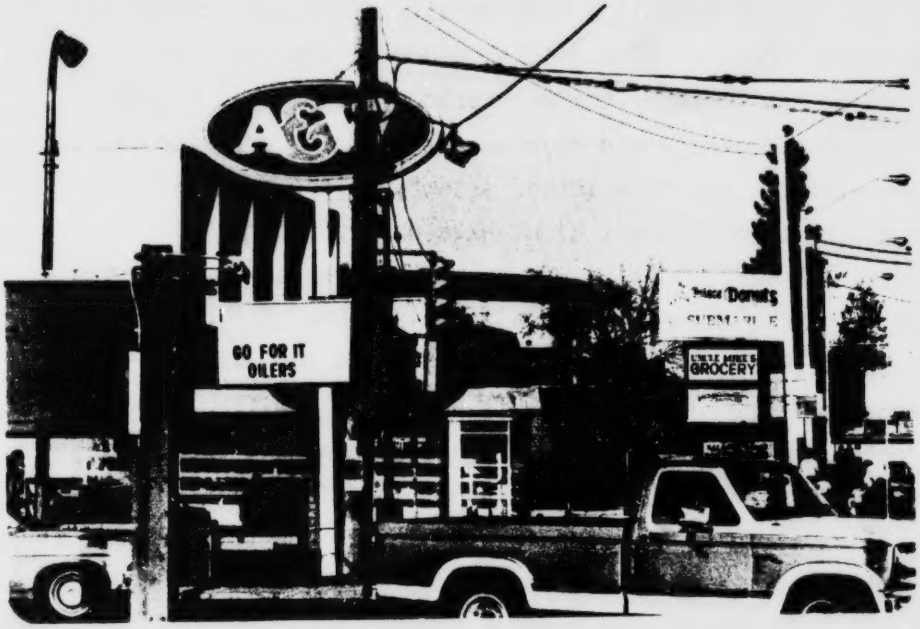
Immediately west of this designated redevelopment zone exists a small pocket of modest single family residences including a small neighbourhood grocery store. To the south of 118th Avenue, the single family homes have been incorporated into direct control land use district, and it follows that the existing uses will remain until such a time as development activity in the vicinity of the L.R.T. station increases substantially. To the north, the residences and neighborhood grocery store are included in a general business district, and it is conceivable that the area may be redeveloped to commercial uses except that the physical limits on the CB-2 zone pre-empts the development of any substantial commercial projects.

West of 79th Street to 81st Street, the form and character of 118th Avenue changes yet again. This is primarily a commercial strip area with a predominance of fast food outlets. Easy access to the Coliseum and Exhibition Grounds may explain why this type of eating establishment flourishes in this location. It may, in fact, be prudent to consider encouraging further development of similar uses in this area and perhaps on adjacent land parcels west of 81st Street.

It should also be noted that the Grant McEwan College Cromdale Campus is a major land use in this area. In terms of a commercial streetscape, its large parking area (formerly servicing a major grocery store in the same location) constitutes a large gap in the development fabric and has the appearance of being underutilized. As such, that portion of the parking area immediately adjacent to 118th Avenue would best be suited to some form of redevelopment or, alternatively could be reorganized to permit public usage of a portion of the parking area if demand warrants.

FIGURE 12

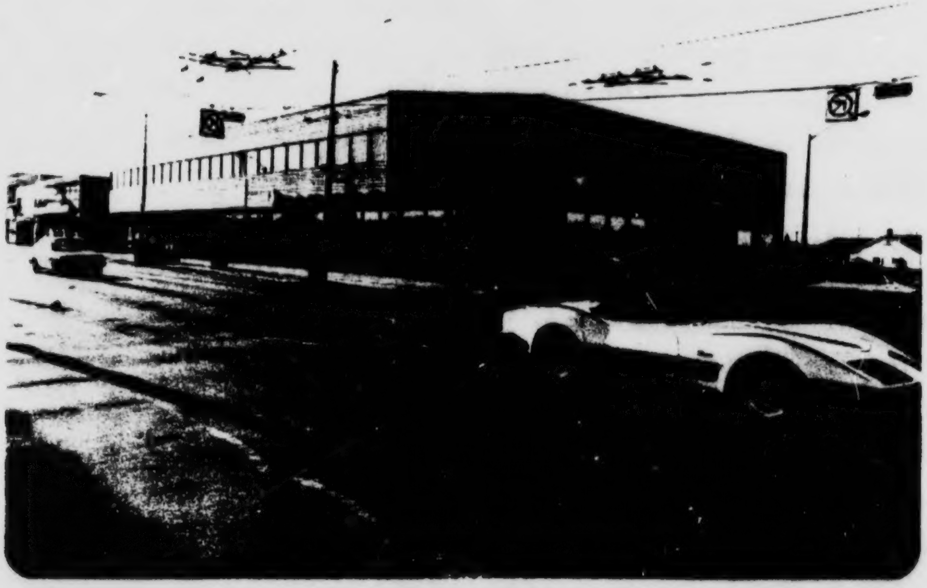
FAST FOOD OUTLETS IN THE VICINITY OF 80TH STREET



The commercial land uses described above extend into the zone west of 81st Street to 83rd Street, but again there is a significant change in the form and character of development. This is essentially a 'main street' type commercial area with structures varying from one to three stories in height forming a more or less continuous frontage along the Avenue. Historically, this area served as a focal point for commercial activity. The present day mix of personal service, retail, and financial service businesses, together with the area's location at the intersection of a major north/south traffic thoroughfare (82nd Street), continues to support its role as a major activity node. The area has, relatively speaking, experienced significant redevelopment activity in recent years with, for example, the construction of the Bank of British Columbia building at the northwest of 118th Avenue and 82nd Street. Recent years have also witnessed two proposals for the redevelopment of the land parcel north of 118th Avenue (between 81st and 82nd Street) to a high density mixed use commercial/ residential complex. The initial proposal was, however, opposed on the basis of the deleterious impact that a high density development would have upon the adjacent residential neighbourhoods, and to a lesser extent, on the basis of the impact such a development might have upon surrounding commercial businesses. A subsequent proposal advanced by Alberta Housing Corporation was approved (RA9 with CB1 commercial uses along 118th Avenue) but not implemented. Although neither of the proposals were ever realized, the subject site still offers significant development opportunities and could serve to reinforce this portion of the 118th Avenue commercial strip as a strong focal point in the total scheme of proposed revitalization measures.

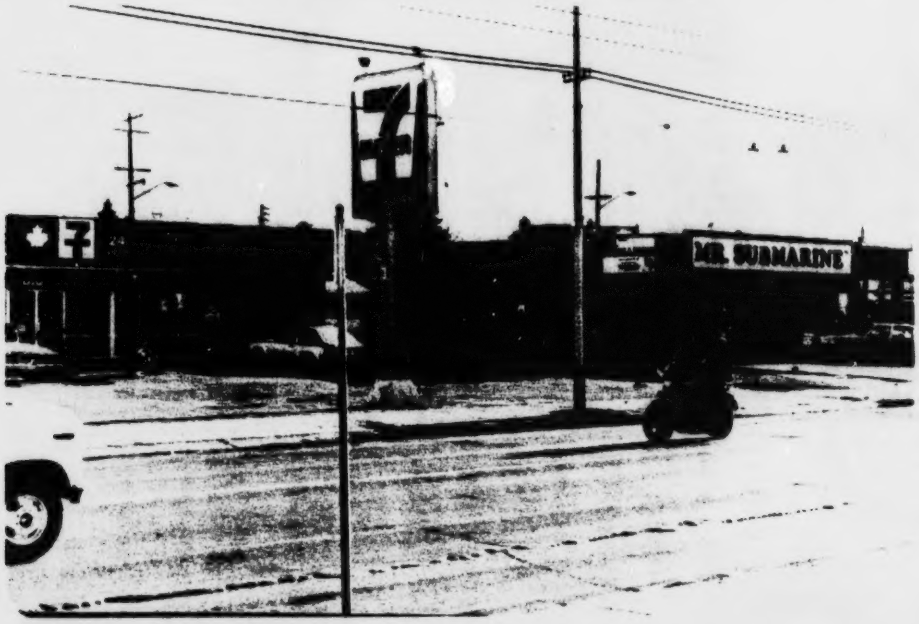
FIGURE 13

118th AVENUE @ 82nd STREET



To the west of 83rd Street, the commercial land use character reverts back to the auto-oriented commercial strip form. This area flanks 118th Avenue between 83rd and 84th Streets, extending along the south side of the Avenue somewhat beyond 86th Street. To the north of 118th Avenue west of 84th Street is St. Alphonsus Church and, immediately adjacent, the Eastwood Community League Hall and grounds. These community facilities are essentially incompatable with their commercial surroundings, but in themselves could serve as focal points for a revitalized business improvement area. Additional landscape development may be appropriate here, acting both as a screen or soft barrier to the opposing auto-oriented retail outlets, and as a visual feature of the 118th Avenue revitalization scheme itself. Furthermore, some landscape treatment may be proposed on the south side of the avenue opposite the church and community hall grounds, substantially strengthening the aesthetic value and functional integration of both sides of the Avenue in this location.

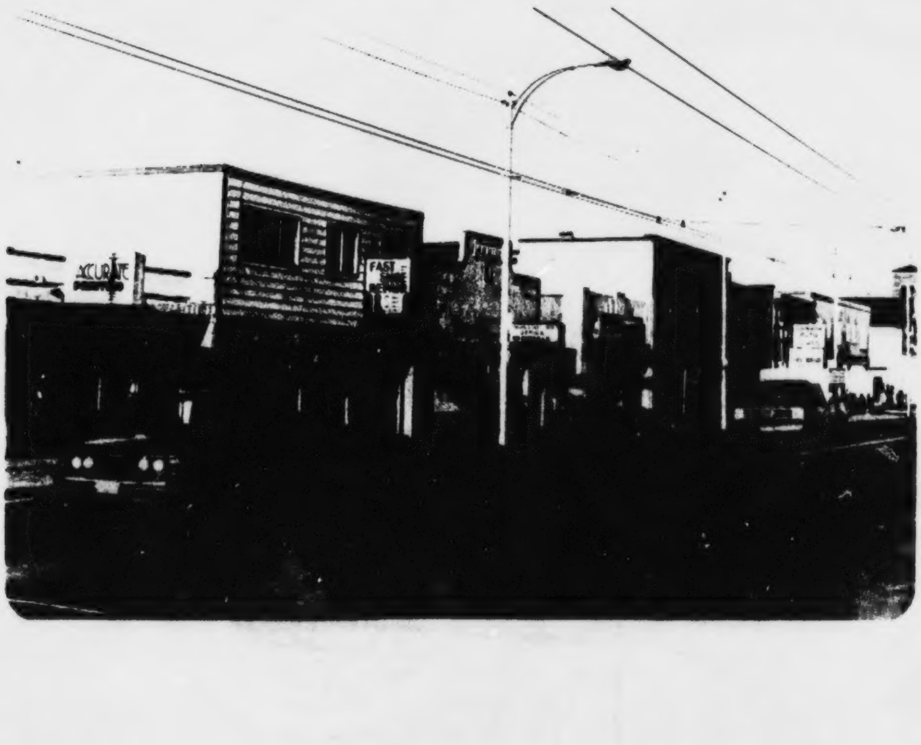
FIGURE 14
AUTO-ORIENTED COMMERCIAL USES
OPPOSITE EASTWOOD COMMUNITY HALL



North of the Avenue and west of the community hall site, the commercial area resumes its main street character. Unfortunately, the area appears to be too small to survive as an independent commercial unit unless the auto-oriented retail and vacant land immediately to the south is redeveloped to support complementary retail establishments. If this proves to be possible, the landscaping tentatively proposed for the area immediately east could be extended along 118th Avenue, terminating in the vicinity of St. Andrew's Church. Some cosmetic landscaping or other minor streetscape improvement may also be proposed along the Alberta Honda frontage to minimize the impact of this relatively isolated auto-oriented retail commercial facility.

FIGURE 15

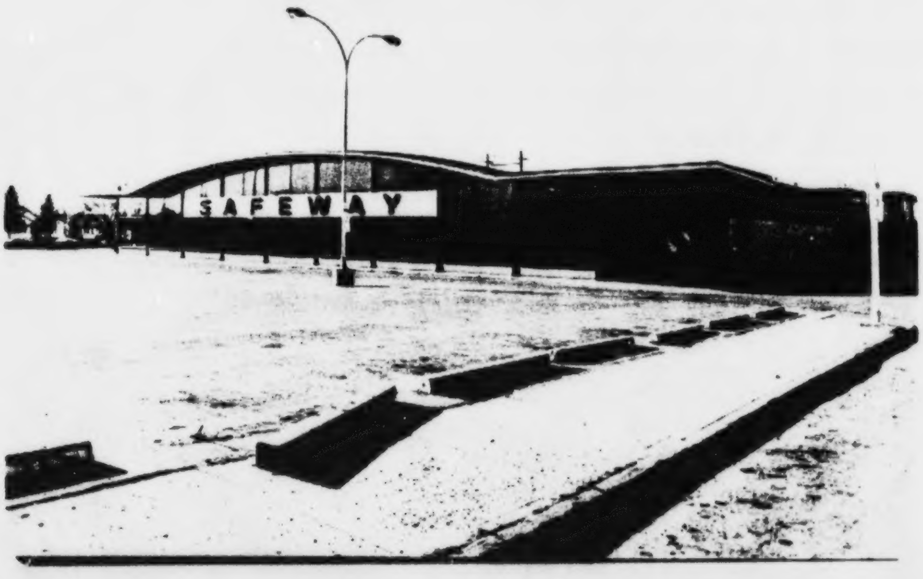
RETAIL COMMERCIAL DEVELOPMENT @ 86th STREET



Further west along the Avenue, the character and type of commercial uses is dominated by the Safeway store located between 89th and 90th Streets north of 118th Avenue. This store, and the adjacent A.L.C.B. outlet, are major traffic generators and, together with the surrounding stores, function much the same as a suburban neighbourhood shopping centre. A relatively large stock of available parking is perhaps this commercial sub-area's most valuable resource. Some judicious utilization of landscaping could serve to knit together a rather disparate array of businesses within the zone of influence focussed on the Safeway store, and by extension, could conceivably promote redevelopment and intensification of retail businesses in line with the level of service provided within neighbourhood shopping centre environments. The future of this portion of 118th Avenue may, however, be significantly affected if the Safeway store is relocated. The feasibility of converting the Safeway site to residential uses has been studied jointly by A.H.C. and Safeway, but the results of this investigation have to date been withheld from the public.

FIGURE 16

SAFEWAY STORE (89th Street)



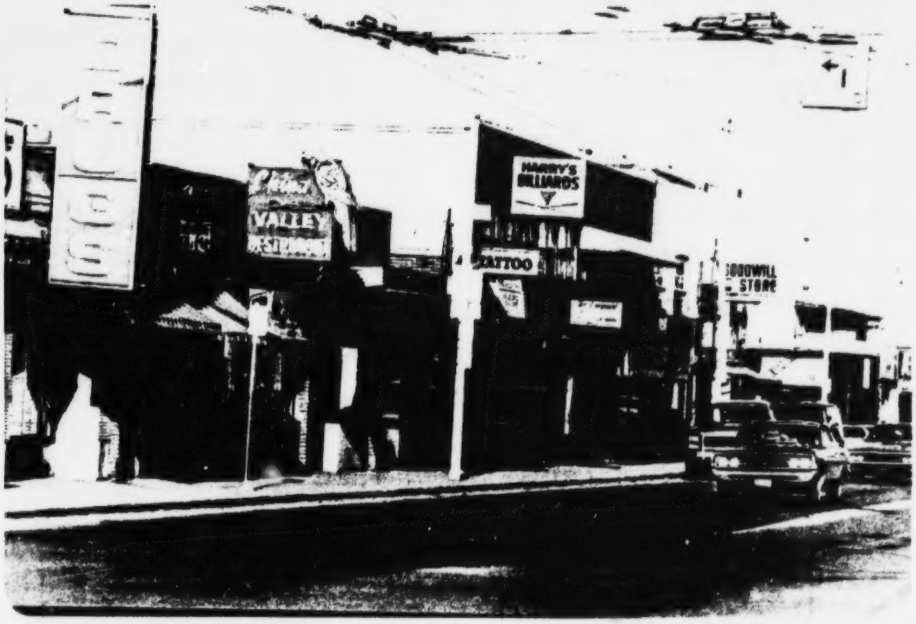
Between the Safeway site and the Alberta Avenue Community League site further west, exist a variety of commercial uses both of the convenience commercial and more regional auto-oriented strip commercial types. Major business enterprises such as Alberta Cycle Honda and Cheeta Cycle are well established in their present locations, suggesting that few immediate opportunities exist to change the commercial fabric of the area in the forseeable future, if indeed this is desireable. Of course, the implementation of alternative proposals centred on the Safeway site will, to a certain extent, influence the scope and extent of revitalization measures that may be applied to this sub-area.

The next sub-area to the west (extending from 93rd Street to beyond 95A Street) is perhaps the strongest example of the main street type of commercial character found in the study area. It is anchored at its east end by the Alberta Avenue Community League grounds, and to the west by St. Patrick's Church. Although some auto-oriented retail outlets and vacant parcels interrupt the continuous main street form, its potential as a inner-city commercial village is not substantially jeopardized by this. This area is perhaps the best suited of all for selective infill development, storefront improvements, and street landscaping, in support of a pedestrian environment that will attract shoppers. It also constitutes a natural gateway to 118th Avenue at the west end of the study area.

FIGURE 17

MAIN STREET COMMERCIAL CHARACTER

(118th Avenue @ 95th Street)



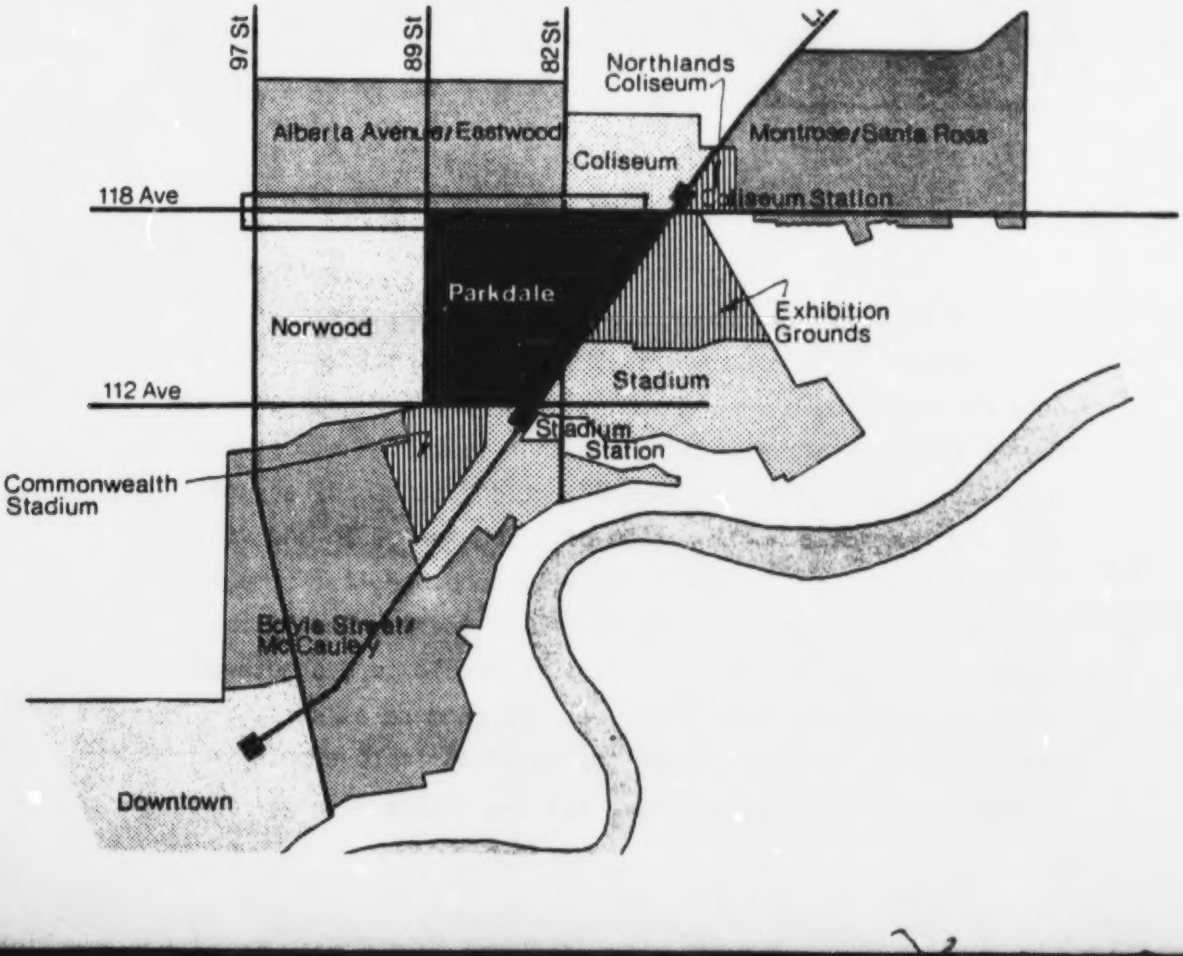
Beyond the mainstreet commercial area described above, auto-oriented commercial land uses dominate the remainder of the study area at its western terminus. These have naturally developed around a major traffic node at 118th Avenue and 97th Street, and given that many of the buildings in this location are of recent construction, it can be assumed that the character and function of 118th Avenue in the vicinity of 97th Street will remain relatively unchanged for some time to come. In the sense that 97th Street is technically the western boundary of the study area it should form a gateway to the business improvement area, but its commercial strip aesthetic leaves little scope for physical improvements in support of an appropriate theme for the Avenue.

4.4 PLAN IMPLICATIONS

Figure 18 shows the location of the 118th Avenue business improvement area in relation to neighbourhood planning jurisdictions. As previously mentioned, the control of development along 118th Avenue is effectively held by the various neighbourhood and special planning jurisdictions abutting the Avenue. Although issues relating to the future of 118th Avenue have been specifically addressed in each of the neighbourhood plans and area redevelopment plans prepared, it is obvious that the sum total of all planning recommendations to date cannot be considered as representative of the needs of the commercial strip as a whole.

FIGURE 18

PLANNING JURISDICTIONS


97 St
89 St
82 St
Northlands Coliseum
Alberta Avenue/Eastwood
Coliseum
Montrose/Santa Rosa
118 Ave
Coliseum Station
Parkdale
Norwood
Exhibition Grounds
Stadium
112 Ave
Stadium Station
Commonwealth Stadium
Boyle Street/McCauley
Downtown

Notwithstanding the above, a review of the relevant planning documents does provide an insight to the issues affecting the revitalization of 118th Avenue. For the communities of Norwood, Parkdale, and Alberta Avenue/Eastwood, the concerns expressed are essentially the same:

- Access to the 118th Avenue shopping area is hindered by traffic congestion, particularly during rush hours and during special events held at Northlands.

- There is a tendency for 118th Avenue business-destined traffic to filter through the neighborhoods (although this has been largely eliminated through the application of various traffic management techniques such as one-way streets).

- There is a general shortage of shopper parking.

- Lastly, the shopping environment along the length of the 118th Avenue study area is in need of aesthetic upgrading.

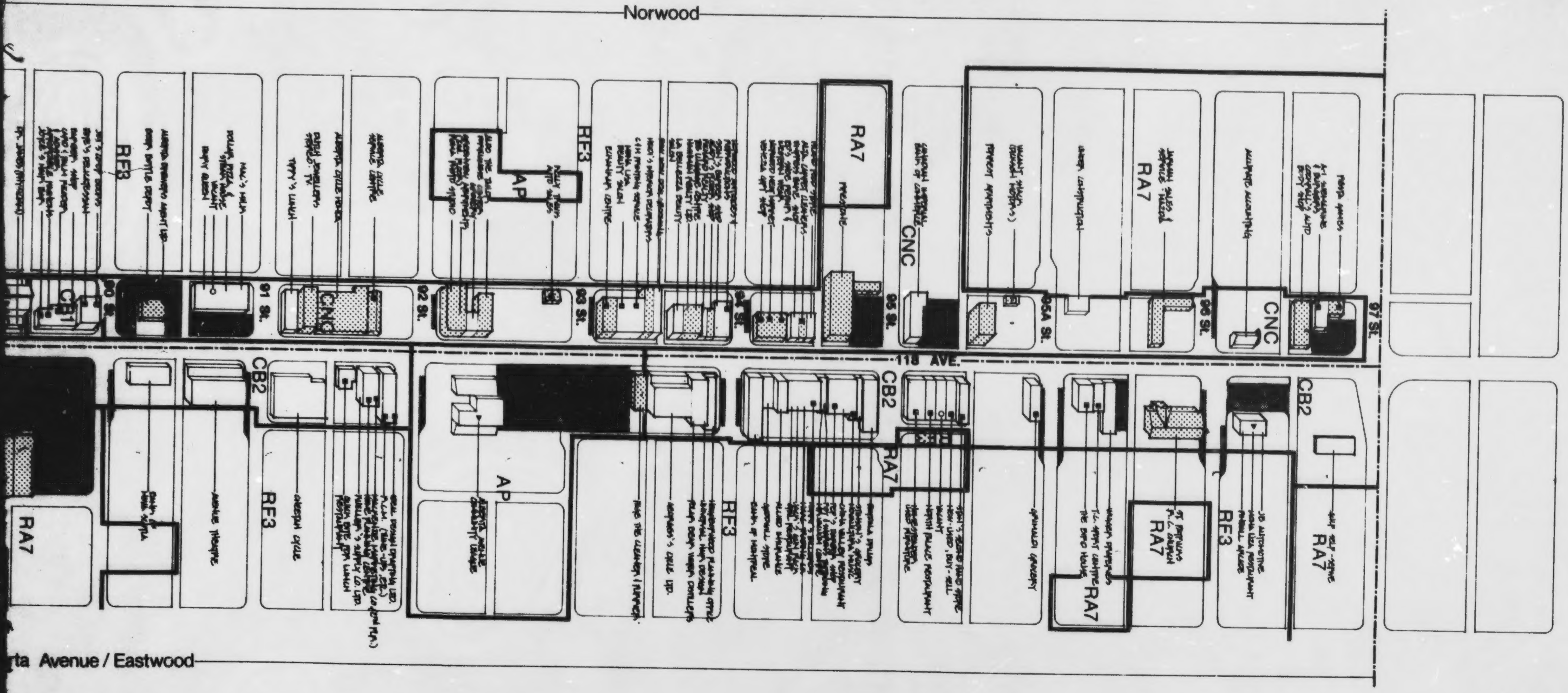
Given that the preservation of the primary residential component of the neighbourhood has been the driving force behind planning recommendations in each case, specific recommendations for a commercial (118th Avenue) component of each neighbourhood plan have essentially been limited to preserving the status quo despite stated objectives such as: "restore and improve the economic viability of the commercial strip ... and make the street inviting and interesting for people to conduct business, shop and work". (Ref. Coliseum Station Area Redevelopment Plan, November 1982.) The net result has been the imposition of a wide range of land use districts and their attendant regulations upon the existing development fabric of 118th Avenue (see Figure 19).

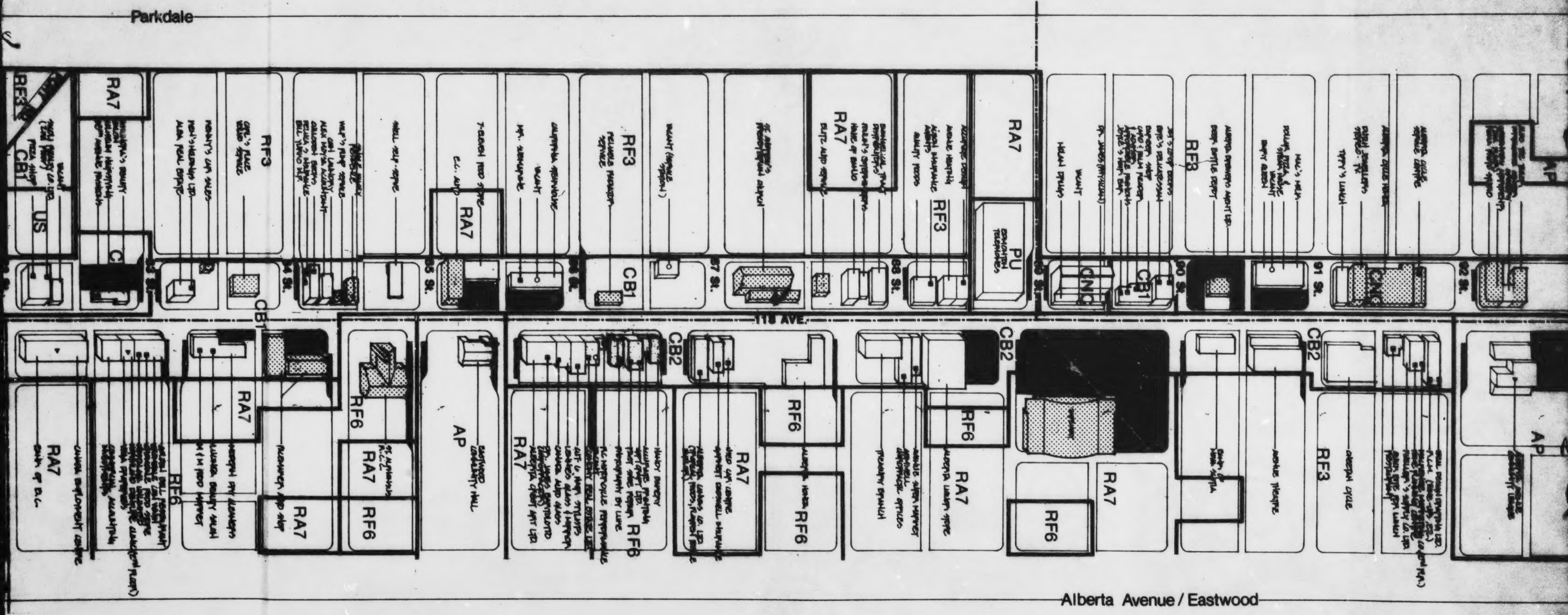
The central features of the existing land use plan are: the limitation of commercial uses basically to a narrow band flanking 118th Avenue; variations in commercial districting along 118th Avenue to accommodate corresponding neighbourhood plan commercial development objectives; the high incidence of non-conforming land uses in some instances; and 'spot' zoning, primarily in response to major existing land uses.

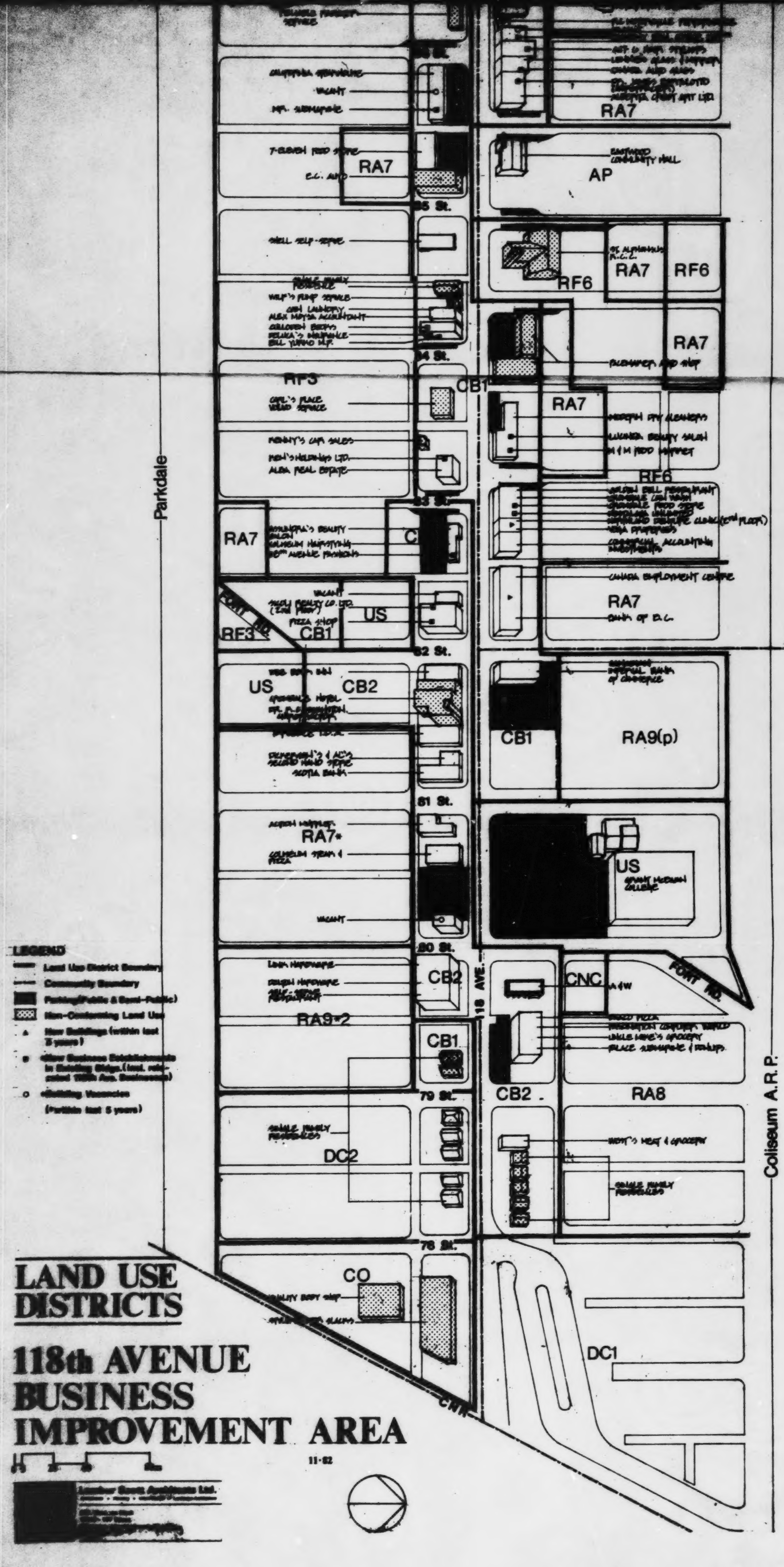
It is clear that limitations on permitted uses and the sometimes onerous on-site parking requirements (coupled with limited developable area), are major disincentives to private sector initiatives directed at the revitalization of 118th Avenue.

To rectify this situation, two alternative approaches may be pursued. First, the commercial land use areas could be redefined within the context of the existing neighbourhood plans and area redevelopment plans, or more specifically, tailored to meet perceived needs within the context of a separate area redevelopment plan bylaw. The 'redefinition' would be in accordance with a predetermined concept plan for the long term development of the study area.

Second, commercial land use designations could be revised to accommodate the widest possible scope of commercial development initiatives governed only by a minimum number of objectives supporting the essential elements of economic revitalization. This implies that the least restrictive land


Norwood
rta Avenue / Eastwood
118 AVE.
97 St.
96 St.
95A St.
95 St.
94 St.
93 St.
92 St.
91 St.
90 St.
RA7
RF3
CNC
CB2
CB1
AP
Alberta Cycle Repair Centre
Cheetah Cycle
Avenue Theatre
Grimaldi Grocery
Firestone
Bank of Montreal


Parkdale
Alberta Avenue / Eastwood
118 AVE.
82 St.
83 St.
84 St.
85 St.
86 St.
87 St.
88 St.
89 St.
90 St.
91 St.
92 St.
RF3
RA7
CB1
US
C
RF3
RA7
RF3
RA7
RF3
RA7
PU
EDMONTON TELEPHONES
RA7
RF3
CNC
CB1
CNC
AP
CB1
RA7
RF6
RA7
RF6
RA7
RF6
AP
EASTWOOD COMMUNITY HALL
RA7
RF6
CB2
RA7
RF6
RF6
RA7
RF6
CB2
RF6
RA7
RF6
RA7
AVENUE THEATRE
CB2
RF3
AP


Parkdale
Coliseum A.R.P.
118 AVE.
85 St.
84 St.
83 St.
82 St.
81 St.
80 St.
79 St.
78 St.
FORT RD.
CNR
RA7
AP
RF6
RF3
CB1
CB2
C
US
RA9(p)
RA7*
RA9*2
CNC
RA8
DC2
DC1
CO
CALIFORNIA SPEEDWASHING
VACANT
MR. SUBMARINE
7-ELEVEN FOOD STORE
E.C. AUTO
SHELL SELF-SERVE
SINGLE FAMILY RESIDENCE
WOLF'S PUMP SERVICE
COIN LAUNDRY
ALEX MOYSA ACCOUNTANT
COLLOSEUM BEEPS
DELKA'S INSURANCE
BILL YURKO M.P.
CARL'S PLACE
MENNY'S CAR SALES
MEN'S HOLDINGS LTD.
ALBA REAL ESTATE
118th AVENUE FASHIONS
COLISEUM HAIRSTYLING
VACANT
PIZZA SHOP
SCOTIA BANK
SECOND HAND STORE
ACTION MUFFLER
COLISEUM STEAK & PIZZA
VACANT
SINGLE FAMILY RESIDENCES
QUALITY BODY SHOP
EASTWOOD COMMUNITY HALL
ST. ALPHONSUS R.C.C.
ART & FRAME STUDIO
NORTH CITY CLEANERS
M & M FOOD MARKET
CANADA EMPLOYMENT CENTRE
BANK OF B.C.
CANADIAN IMPERIAL BANK OF COMMERCE
GRANT MacEWAN COLLEGE
A & W
UNCLE MIKE'S GROCERY
SINGLE FAMILY RESIDENCES

LAND USE DISTRICTS

118th AVENUE BUSINESS IMPROVEMENT AREA

11-82

LEGEND

- Land Use District Boundary
- Community Boundary
- ■ Parking(Public & Semi-Public)
- ▨ Non-Conforming Land Use
- ▲ New Buildings (within last 5 years)
- ● New Business Establishments in Existing Bldgs. (incl. relocated 118th Ave. Businesses)
- ○ Building Vacancies (within last 5 years)

use designations would be applied more or less uniformly along the entire length of the commercial spine. As with the first approach noted above, this could be accommodated either by way of redistricting amendments to existing zoning and area redevelopment plan bylaws, or through the vehicle of a separate area redevelopment plan bylaw for 118th Avenue.

Under either scenario, it would seem that the designation of a 118th Avenue Business Improvement Program Area Redevelopment Plan Bylaw (A.R.P.B.) offers the potential for maximum flexibility to accommodate various forms of development. Statutory plan overlays could be creatively employed to increase the latitude of standard development regulations. An A.R.P.B. would also allow for an accurate expression of planning and revitalization objectives as a guide for the administration and review of development proposals, particularly where descretionary matters are concerned.

The only potential drawback of an area redevelopment plan bylaw is the acceptability of the redevelopment levies charged against new projects in plan areas with the A.R.P.B. designation. Traditionally, these funds are set aside for the acquisition and development of open space. This is, however, unnecessary and inappropriate to the economic revitalization objectives of a commercial strip. Alternatively, the redevelopment levy fund should perhaps be utilized to finance streetscape improvements, but this would require an amendment to the Planning Act to permit such an appropriation.

In terms of the two basic approaches described above, the first option hinges on a fairly accurate interpretation of the private sector takeup of development options outlined in a long range concept plan. It is clear from an analysis of the existing structure of the 118th Avenue commercial unit that this will be, strictly speaking, extremely difficult to predict. The very nature of the type, tenure, and physical relationships of the various land uses, allow for almost innumerable interpretations of the likely direction of future growth. At best, a land use plan for 118th Avenue would require revisions, perhaps of a substantial nature, on a very frequent basis.

Alternatively, the second approach would be more adaptable and flexible to changing circumstances and would probably appear more attractive to potential investors. The major disadvantage of a 'blanket' zoning approach is, of course, the loss of a certain amount of planning control over future developments and, not incidently, affected community/ interest groups may object to the allowance of 'uncontrolled' development as of right.

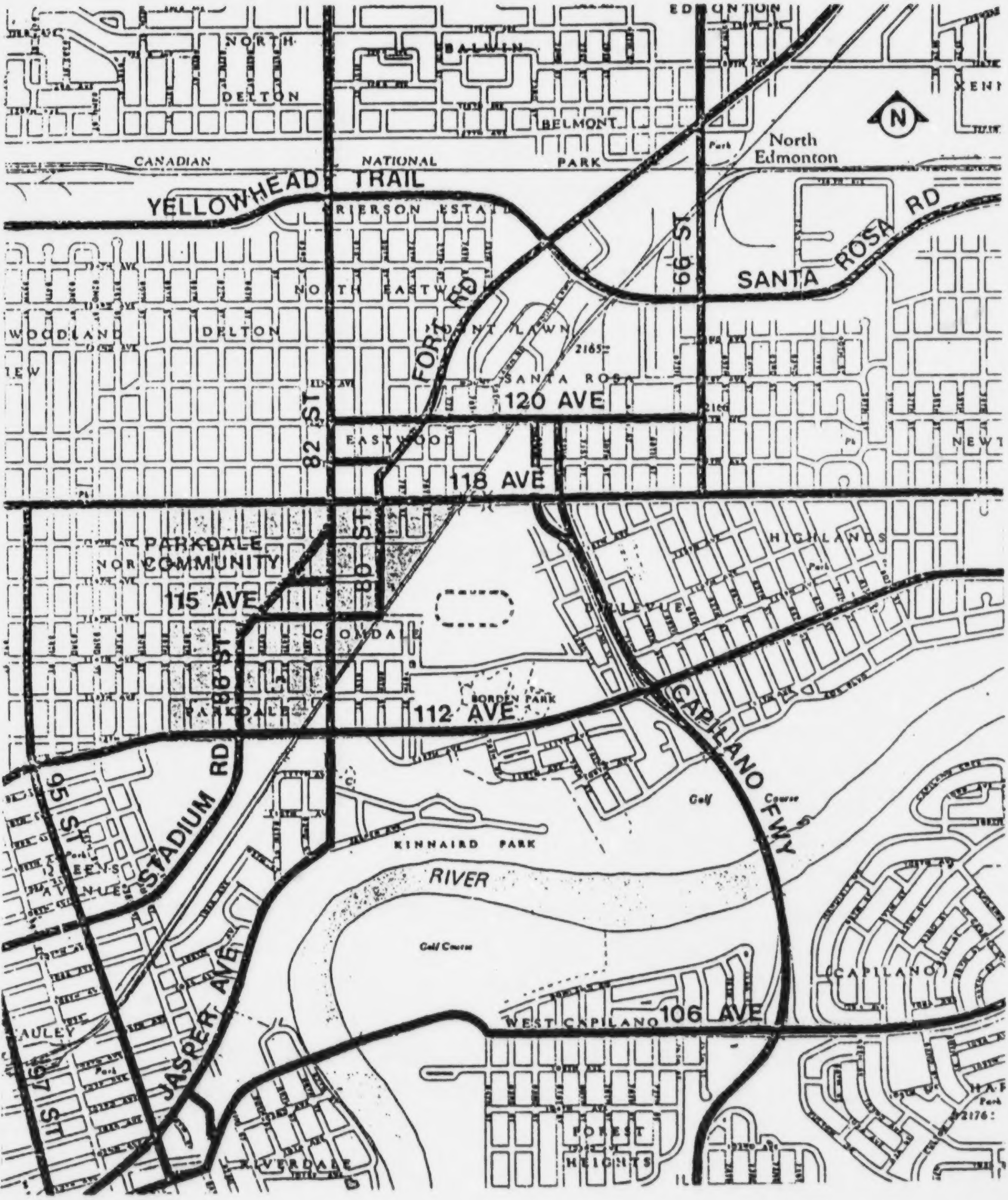
In summary, it is recommended that a series of workshops involving local businessmen and community leaders be held subsequent to this study to determine if a consensus may be reached regarding a long range physical development plan for 118th Avenue and to identify the vehicle and approach (in terms of zoning) that best fits the situation.

4.5 TRANSPORTATION

118th Avenue -- including that segment within the limits of the study area -- forms a portion of the major arterial network in northeast Edmonton (see Figure 20). In its role as an access corridor to the northeast industrial area and adjacent commercial developments, it carries a twenty-four hour truck route designation from the Beverly interchange to the 101 Street traffic circle.

FIGURE 20

ARTERIAL NETWORK IN THE VICINITY OF 118th AVENUE


YELLOWHEAD TRAIL
FORT RD
66 ST
SANTA ROSA RD
120 AVE
82 ST
118 AVE
80 ST
PARKDALE COMMUNITY
115 AVE
86 ST
112 AVE
CAPILANO FWY
95 ST
STADIUM RD
97 ST
JASPER AVE
106 AVE
RIVER
KINNAIRD PARK
BORDEN PARK
North Edmonton
CANADIAN NATIONAL PARK
N
HIGHLANDS
BELLEVUE
CAPILANO
WEST CAPILANO
FOREST HEIGHTS
RIVERDALE
DELTON
BELMONT
EASTWOOD
SANTA ROSA
WOODLAND
PARKDALE

Presently 118th Avenue is basically a four lane undivided roadway, varying in width from 44 to 48 feet. Current traffic volumes generally exceed the design capacity of the roadway, resulting in traffic congestion during the evening rush hour in both east and westbound directions.

In recent years, four major planning and transportation studies have addressed the future role of 118th Avenue as a major transportation corridor:

1) the Northeast Light Rail Transit Corridor Study (1978)
2) the Northeast Roadway Network Review (1980)
3) the Parkdale Area Redevelopment Plan Bylaw; and
4) the Coliseum/Stadium Station Area Redevelopment Plan Bylaw

The N.E.L.R.T.C. Study identified as one of its primary objectives, the need to implement a rational arterial road system in north-east Edmonton to provide for: increased access to the area (particularly the L.R.T. Stations); a smoother flow of through traffic; and the separation of through and local traffic in order to reduce the disruption to existing neighbourhoods. Subsequent to City Council's approval of the N.E.L.R.T.C. Study, the Northeast Corridor Transportation Review was undertaken to evaluate and assess the proposals put forward in the N.E.L.R.T.C. Study. This review concluded that 118th Avenue should retain its arterial status and in fact should be slated for future widening through the study area. The widening proposals vary from four to six lanes, with the section from 78th Street to 80th Street designated as a six lane divided roadway, and that portion of 118th Avenue between 80th Street and 82nd Street, a four lane divided roadway. Widening is also proposed along 118th Avenue east of 79th

Street subject to the alternative adopted for the Capilano extension (forming a portion of the northeast arterial network). The official status of this project permits property acquisition for the necessary widenings on an ongoing basis (usually as a development occurs). The purpose of this long term upgrading plan is, ostensibly, to provide for better business access and maintain the required access for truck traffic.

Traffic movements and volumes supporting current proposals are based upon both existing and historical data and reflect the use of all available roadway capacities in the arterial network. It should be noted, however, that traffic volume estimates reflect population employment projections compiled in 1978 which indicated that by the year 2001 there would be seventy thousand people residing in the northeast, one hundred thousand jobs in downtown, and assumed an employed population participation rate of 40%. In light of current demographic trends, it is abundantly clear that these base assumptions underlying the recommended configuration and capacities of the major arterials in northeast Edmonton are exaggerated. The situation should therefore be reassessed.

An origin/destination study of traffic movement through the proposed business improvement area would be extremely beneficial. It would provide the rationale for (or against) current road widening proposals and for the necessity of a 118th Avenue truck route designation (particularly in view of the recently completed high capacity Yellowhead arterial paralleling 118th Avenue to the north). The results of an origin destination study will prove invaluable in assessing revitalization proposals which may feature traffic restriction by way of sidewalk widenings or dedicated transit ways.

Until the necessary studies are complete, land use planning should assume that the truck route designation will be removed, and that there is some flexibility in the present design capacity of 118th Avenue to accommodate limited streetscape improvements.

This assumption is supported in part by our survey findings which indicate that improved accessibility to businesses on 118th Avenue by means other than the automobile would reduce traffic congestion somewhat. For instance, the 118th Avenue shopping survey revealed that 52% of all respondents living within four blocks of 118th Avenue used their car for shopping trips.

In terms of alternate transportation modes, regular bus transit is provided along 118th Avenue through the study area with good connections to the L.R.T. This resource could perhaps be utilized more extensively as specific revitalization plans for 118th Avenue take shape. If the commercial strip developed a series of attractions or focal points, transit service could be coordinated with these and the frequency of service increased with only minor modifications to existing routes. Transit could, of course, become an attraction in itself by introducing special '118th Avenue shuttle buses' into the present service. Various ideas submitted on this subject range from the modest (i.e. standard coaches painted with graphic designs appropriate to the 118th Avenue theme) to the lavish (i.e. utilization of double decker buses or the reintroduction of street car service on a dedicated right-of-way through the study area).

In any case, an efficient public transit service would undoubtably increase accessibility, reduce traffic congestion, and help to alleviate the parking problem. In fact, parking related to transit allows for the consideration of remote parking concepts if projected ridership warrants.

4.6 PARKING

Parking, parking, and parking -- these seem to be the three most significant constraints to the revitalization of 118th Avenue according to many of the businessmen and shoppers interviewed on this subject. A business survey undertaken as a component of this study revealed that 53% of the respondents viewed parking as a problem, and 44% of the same group thought the parking situation unsatisfactory for their customers. Over 80% of the businessmen interviewed agreed that the parking situation over the last 3 to 4 years has remained the same or, in fact, worsened. In terms of revitalization priorities, the need for improved parking is at the top of the list. A poll of the residents of nearby communities also showed a high degree of dissatisfaction with the current parking situation - 43% of the respondents were critical of the status quo. The on-street survey of shoppers revealed that 27% of the respondents would like to see parking improvements, and a equal percentage viewed parking congestion as a problem.

With these statistics in hand, it may seem abundantly clear that inadequate parking is a significant, if not the major, obstacle blocking the successful revitalization of 118th Avenue. Yet the experience of other cities with similar commercial revitalization problems suggests that this may indeed not be the case and that a closer look at the 'problem' is in order. Besides the sheer capacity of a commercial area to provide the maximum possible number of parking spaces, 'adequate' parking is also a function of: destination (i.e. where people are headed on their various shopping trips);

shopping habits (i.e. the frequency and timing of shopping trips and the number of businesses patronized on any given trip); the extent of automobile usage for shopping trips; and convenient access to shopping destinations and their proximity to parking areas. Each of these considerations is summarized below within the context of the 118th Avenue commercial strip.

In terms of 'destination', the theory that businesses which are heavily reliant on drive-in trade must provide adequate on-site parking for their customers, generally holds true for 118th Avenue. Safeway, the A.L.C.B. outlet, various auto repair outlets, fast food restaurants, and even some convenience commercial establishments, have provided adequate on-site parking by necessity. Other business outlets do not perhaps enjoy the luxury of 'front door' parking, but then the nature of these businesses is such that they have historically relied upon walk-in trade as their primary clientele. In any case, where there is an expectation that parking should be available at the front door, failure to deliver this service often results in a disproportionate degree of dissatisfaction with the 'parking situation'. The situation can, and has in other instances, been ameliorated by the development of pleasant pedestrian routes connecting parking spaces/lots with shopping destinations. Furthermore, the inconvenience of having to park some distance from the shopping destination often pales in significance if the shopping destination and its surroundings is a strong attraction in itself. It may seem incongruous to use the modern shopping centre to illustrate this point, but it is interesting to note that during peak shopping hours visitors to a shopping mall will walk considerable distances from the furthest reaches of the parking area to get to the 'centre' whereas they are reluctant to do so when frequenting downtown or inner-city commercial areas.

Shopping habits too, shape the perceived need for parking and, in fact, are an important factor in the calculation of actual parking demand in any given area. On 118th Avenue, over two-thirds of shoppers interviewed in recent surveys use an automobile for their shopping trips. Moreover, if the surveys are representative of the shopping clientele, 80% of all users visit 118th Avenue at least once a week. Most of the 118th Avenue clientele appears to come from the adjacent neighbourhoods and regard the Avenue as a convenient place to shop despite the traffic congestion, difficult access, inadequate parking, and poor quality of the shopping environment (in terms of its physical appearance and lack of amenities). In sum, shopping habits seem to be characterized by an allegiance to a familiar shopping environment and the extensive use of automobiles for shopping trips. It may be said that the parking problem in relation to shopping habits is, in this case, perhaps an artificial one: improved pedestrian and transit access together with some diversification of the business profile to encourage comparative shopping would most certainly reduce the level of apparent and actual parking deficiencies.

The existing proportion of all shopping trips made by car cannot, however, be ignored. This is a real demand on parking facilities dictated by social and cultural values as much as anything else. In this regard, current levels of car trips to 118th Avenue can be accommodated both through the 'rationalization' of existing parking facilities (to render them more efficient in terms of capacities), and by way of optimizing the free flow of traffic through and around the commercial strip.

On the basis of the foregoing, it should be apparent that the extent of parking demand over and above existing capacities to serve existing and proposed levels of commercial development cannot be isolated from the need for convenient access, the potential benefit of good pedestrian linkages, the impact of landscaping and beautification measures, public transit options, et cetera. If indeed parking is considered in isolation, or conversely, if other concerns exclude the parking issue, then any revitalization plan for a more efficient and attractive shopping district will be less than optimal. By way of an example, the implementation of the one-way street system in the adjacent neighbourhoods[1] ostensibly succeeded in its objective of minimizing the commercial traffic impact on these areas but, at the same time, decreased accessibility and increased traffic and parking congestion in the study area proper.

What then might the solution be? In the first instance, this will depend upon the scope of the revitalization effort. Maintaining the status quo more or less would provide the base case, with more ambitious revitalization plans requiring more sophisticated solutions. Under the modest base case scenario, effort should focus upon maximizing the efficiencies of the existing parking resources. This would include the utilization of traffic management techniques to improve access and hence convenience. Cooperative efforts among adjoining business premises may also be undertaken to redevelop rear yard areas and the like into more efficient parking facilities. Restrictions could also be relaxed, possibly allowing for free parking for limited time periods to maximize the utilization of existing parking spaces (this would be of great advantage to the one-stop convenience shopper). Additionally, large parking areas associated with public facilities (eg. community league parking lots, the Grant McEwan site, etc.) could perhaps be opened up to increased usage by the shopping public.

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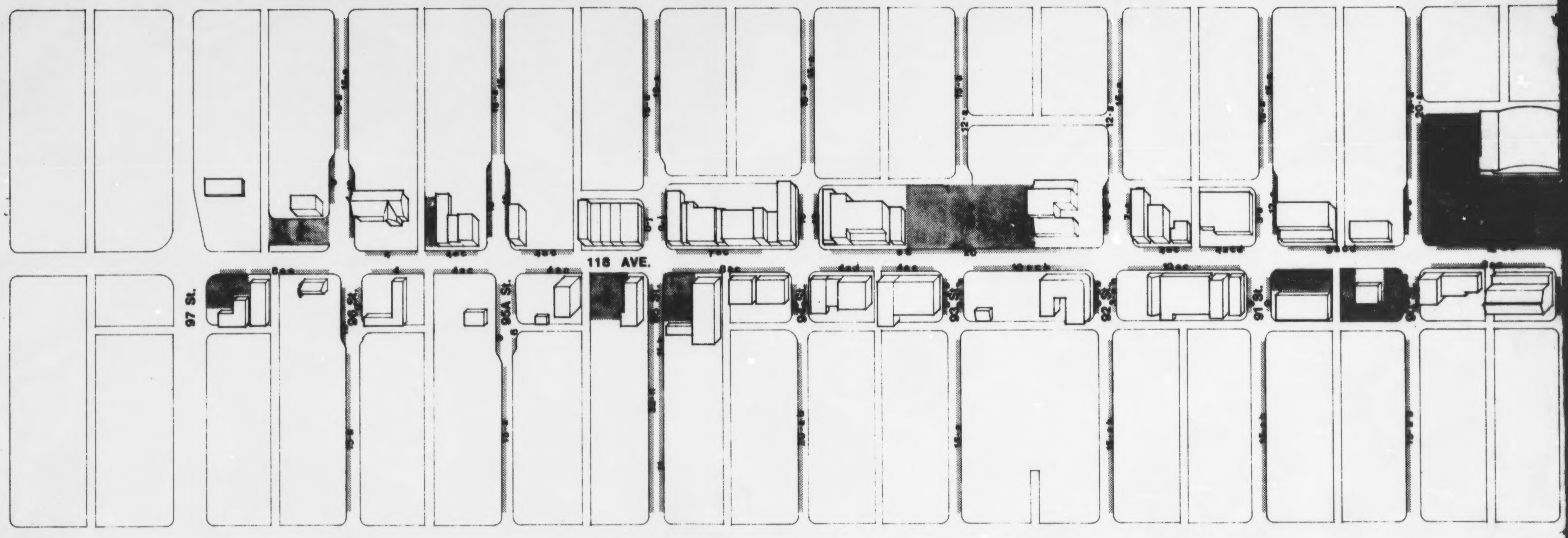
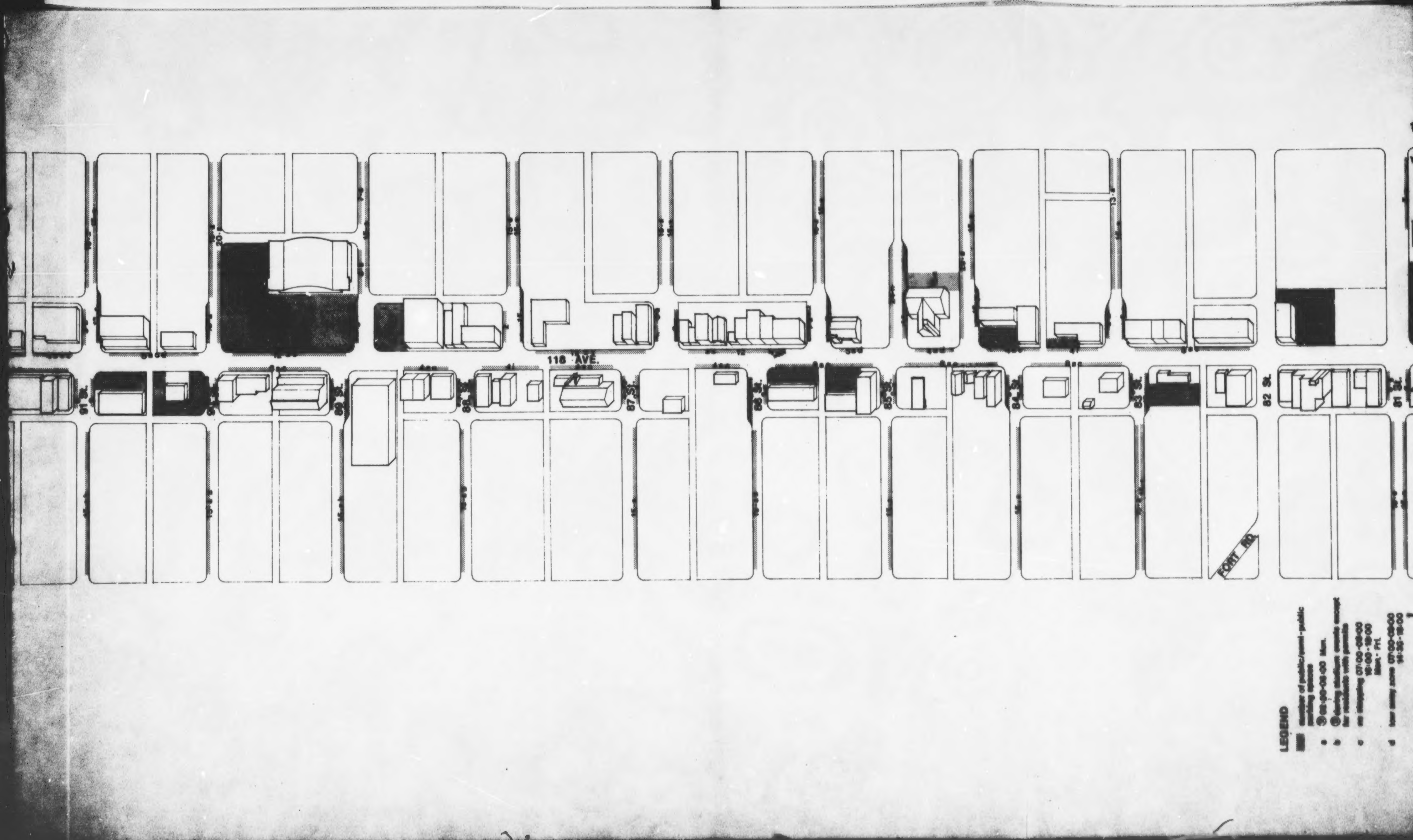
[1] One way traffic route restrictions are scheduled to be lifted later this year.

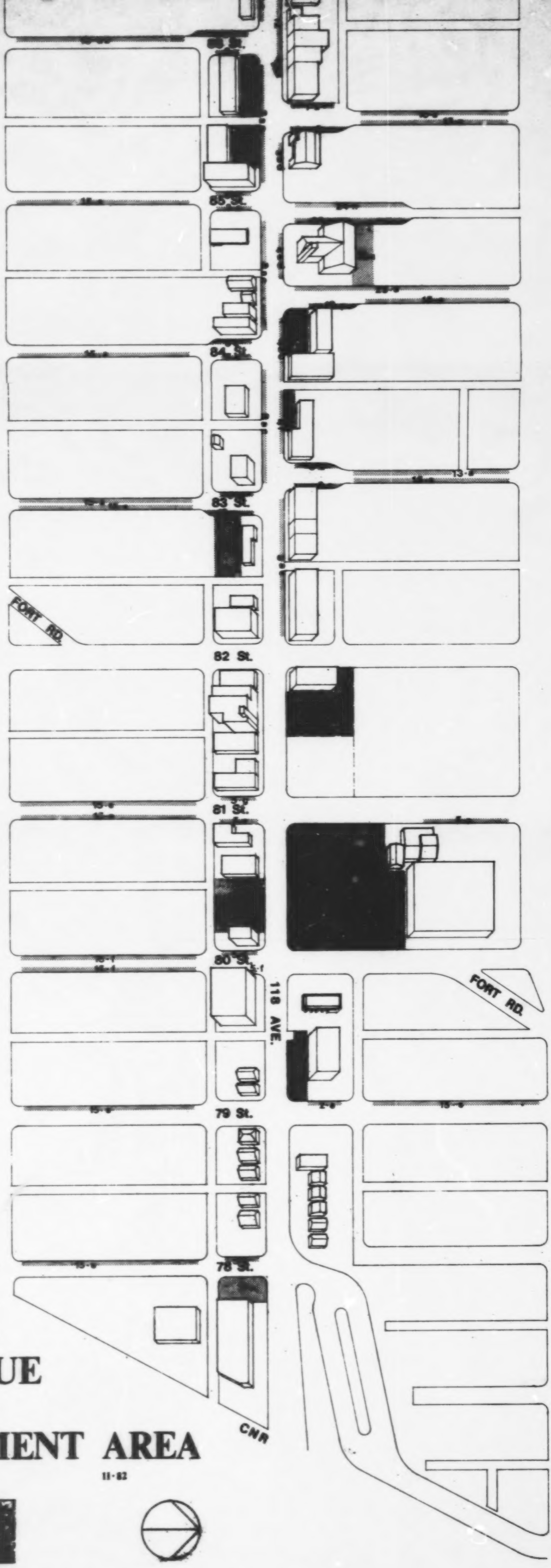
With respect to more extensive revitalization plans, currently vacant land parcels could be purchased or leased as permanent or temporary parking areas to augment the existing parking supply. If the limits to commercial development both north and south of 118th Avenue are expanded somewhat, then the viability of on-site parking would also be greatly enhanced. In the most expansive of development scenarios, parking structures could be built at transit nodes and linked to shopping destinations by means of convenient public surface transit modes. It is entirely conceivable too that a 118th Avenue 'parking authority' could be established to develop and manage parking resources in the public domain.

The current stock of parking in the study area numbers over two thousand spaces, not including private on-site parking. This translates into approximately twelve spaces per business establishment, and although this allocation is subsidized by some larger enterprises to a certain extent, over 70% of the available parking supply is within the public domain. This permits the application of creative planning concepts to meet future parking needs, and provides the basic resources required to meet parking objectives for the foreseeable future.

Figure 21 provides a inventory of parking facilities within the study area, serving as the basic tool for the development of parking strategies in relation to overall revitalization objectives. At the most fundamental level, proposed modifications to the existing parking situation may be assessed against this base.


118 AVE.
97 St.
96 St.
95A St.
93 St.
92 St.
91 St.


118 AVE.
91 St.
90 St.
89 St.
88 St.
87 St.
86 St.
85 St.
84 St.
83 St.
82 St.
81 St.
FORT RD.
LEGEND
number of public/semi-public parking spaces
a ③ 08:00-09:00 Mon.
b ② during station events except for residents with permits
c no stopping 07:00-09:00 16:00-18:00 Mon.-Fri.
d tow away zone 07:00-09:00 16:30-18:00


85 St.
84 St.
83 St.
82 St.
81 St.
80 St.
79 St.
78 St.
118 AVE.
FORT RD.
FORT RD.
CNR
13-e
2-e
15-e
11-82

LEGEND

▨ number of public/semi-public parking spaces

- a Ⓡ 02:00-06:00 Mon.
- b Ⓡ during stadium events except for residents with permits
- c no stopping 07:00-09:00
  16:00-18:00
  Mon.- Fri.
- d tow away zone 07:00-09:00
  14:30-18:00
- e 2 hr. Ⓟ 09:00 - 22:00
  except residents
- f 2 hr. Ⓟ 09:00-15:30 except
  18:00 - 22:00 residents
- g 1 hr. Ⓟ 09:00 - 22:00
  except residents
- h 1 hr. Ⓟ 09:00-18:00 Mon. - Sat.
- i 30 min. Ⓟ 09:00 - 18:00
  Mon. - Fri.
- j 30 min. Ⓟ 09:00 - 18:00
  Mon.- Sat.
- k loading zone trucks 10 min.
  09:00-18:00 Mon. - Sat.
- m permit holders only
- n semi-public parking
  (customer parking)
- p 2 hr. Ⓟ Mon. - Sat.
- q 30 min. Ⓟ 09:00 - 18:00
  Sat. only
- r 30 min. Ⓟ 09:00 - 18:00
  Mon. - Sat.

PARKING INVENTORY

118th AVENUE BUSINESS IMPROVEMENT AREA

5. ECONOMIC AND MARKET CONSIDERATIONS

The data used to assess the economic and market problems and potential of the 118 Avenue business community have been derived largely from the surveys carried out during the course of the project and from various field evaluations carried out by the study team. The section that follows addresses: first, the main economic and marketing features pertaining to the 118 Avenue business community; second, the relevant shopping characteristics and attitudes of the surrounding neighborhood, which represents a primary and logical market area for the local businesses; and third, the major patterns of shoppers now patronizing the 118th Avenue businesses.

5.1 THE BUSINESS COMMUNITY

5.1.1 Number of Businesses

There are approximately 170 commercial and non-commercial establishments in the 118 Avenue study area. Of that number, it is estimated that roughly 100 establishments are of a type or nature which potentially might be interested in participating in a Business Improvement Program. The survey of businesses carried out as part of the project obtained a response from 62 businesses. That response rate is considered to be adequate to derive an understanding of the structure and perceptions of the local business community.

5.1.2 Mix of Businesses

The business community along 118 Avenue has been aggregated into four main categories as shown below:

i)	Retail trade	73
ii)	Finance, insurance, real estate	17
iii)	Community, business, and personal services	74
iv)	Public administration and other	6
	Total	170

Within the retail trade sector, food stores comprise the largest single group of establishments. This group includes many businesses which are small grocery and confectionery outlets. There are a limited number of combination food stores or supermarkets which provide a large selection of groceries together with fresh meat and vegetables. Food stores in the study area also comprise a significantly larger share of total establishments by comparison with similar business areas elsewhere.

The automotive group of outlets appears to have a relatively high representation in the 118 Avenue business area. This is particularly so in respect of automobile dealers and repair facilities. There are few gasoline service stations along the Avenue. The prominence of the automotive sector has important implications to the business structure of the Avenue because these kinds of establishments are generally large land users and tend to fragment or to disrupt the continuity and homogeneity of the 118th Avenue commercial unit.

The study area appears to have an unusually low number of clothing and dry goods, general merchandise, and furniture and appliances outlets. Stated in different terms, there are a limited number of shopping facilities for higher-order goods.

In the services sector the study area appears to have a disproportionate representation of amusement and miscellaneous services facilities and a relatively small number of accommodation and restaurant operations.

The analysis of the types of establishments that make up the 118 Avenue business community suggest that it serves primarily a low-order, convenience, neighborhood business function. This is characteristic of many inner-city commercial strips experiencing a decline in retail strength in competition with modern, well consolidated shopping centres.

5.1.3 Ownership

Approximately 90 per cent of the outlets that responded to the business survey are independently owned. The remaining businesses are franchise operations or branch offices. Approximately 40 percent of the independent businesses own the business premises which they occupy. The ownership pattern suggests that many business operators in the area will have the incentive and authority to undertake actions to enhance their business area; on the other hand, the predominance of independent operations suggest that the management, merchandising, and financial resources that are available to the local merchants may be limited.

5.1.4 Sales

The businesses along 118 Avenue are generally of a small size. This is confirmed by sales information revealed through the business survey. Approximately two-thirds of the respondent businesses have annual sales of less than $250,000 per year. Insufficient quantitative data are available to indicate to what extent retail sales in the business area have kept pace with the general growth in retail sales experienced elsewhere in the City and the Province. In terms of profits, however, somewhat less than two-fifths of the business respondents indicated that their firms' profitability had improved over the past three or four years; the remaining businesses showed either static or poorer profits over that period. The available evidence suggests that the business area has not generated a sufficiently high rate of sales growth to provide a confident picture of the area's future viability in the absence of a Business Improvement Program.

5.1.5 Business History

The businesses in the area are well established. Approximately 40% of the businesses in the area have been operating more than ten years and more than 60% have been in operation in excess of five years.

5.1.6 Occupancy Costs

Almost two-thirds of the business operators in the area rent their commercial space. This high proportion of renters has negative implications in terms of the ability of the occupants to initiate and to finance various improvement projects. Many of these initiatives necessarily must involve the owners of the property and only a minority of these owners are believed to be represented on the East Edmonton Business Association and familiar with the Business Improvement Program. Commercial rental rates in the area are low, ranging from an estimated $5 to $6 per square foot annually to approximately $10 per square foot on the high end of the range. The low level of rents tend to attract independent businesses and establishments characterized by low volume and typically low profitability. From a positive standpoint, the low rental costs may serve to attract a wide variety or mix of businesses; from a negative perspective, the low rents in combination with the existing business profile may serve to perpetuate the current nature and quality of development in the area.

5.1.7 Competition

It may be significant that while approximately 45 per cent of business operators in the area feel that their neighbors complement their services or compete with them, a similar proportion of merchants feel that the nearby businesses have no effect on them one way or another. The latter supports the view that many local merchants operate in apparent isolation from their neighbors, and suggests opportunities along the Avenue for businesses to mutually reinforce and support each other through various activities.

5.1.8 Operating Environment

Almost one-half of the respondents to the business survey believe that it is becoming harder to operate a business in the study area. Most of the remaining respondents see little change in the operating environment or are not sure one way or the other. In looking at key indicators of the economic and physical health of the 118 Avenue business area, more businesses believe that conditions have deteriorated rather than improved over the past three or four years. The business mix of the area, local traffic conditions, the economic conditions of the nearby residential areas, and the stability of the local businesses are particular considerations which are perceived to have worsened in recent years.

5.1.9 Plans and Prospects

Notwithstanding the negative factors that have been portrayed in the business survey it is surprising that a majority of merchants, approximately two-thirds of business operators in the study area, believe that the long-term prospects for their business are good or excellent. A small minority of respondents believe that the prospects for their business are poor. In this context, it would appear that the Business Improvement Program should be able to build on an underlying foundation of optimism on the part of the local business operators.

The business survey queried merchants in respect of their business plans over the next two or three years. Approximately 20 per cent of respondents indicated an intention to close or move their business. More than one-half of respondents indicated that no changes in their operations were anticipated. However, it is significant that roughly one-third of the operators indicated a plan to renovate, expand the business, or change the types of goods and services offered. This suggests that the business area is by no means a static one, and that the plans for changes in the area provide an opportunity for support and reinforcement through business improvement measures.

5.1.10 Perceptions About the Study Area

The greatest assets of the study area, as perceived by business operators, include the following: the personalized service offered, the established clientele, the low operating costs, the good transportation access to businesses, and the convenience to nearby neighborhoods. The parking availability in the area, the physical appearance of the area, traffic congestion, and the general economic conditions in adjoining neighborhoods are considered to be the key disadvantages faced by 118th Avenue businesses.

5.1.11 Need for Improvements

The need for improvements to 118 Avenue to attract more people appears to be recognized by a large majority of merchants -- approximately four-fifths of all respondents believe that improvements are required. In terms of the types of changes desired, improved parking, store front improvements, and the development of a distinctive theme or image for the area received particular approval. A need for improved traffic flow in the area, area beautification measures, and an improved mix of businesses also received support.

5.1.12 Program Awareness and Participation

The success of a Business Improvement Program is contingent upon the strong support of the benefiting businesses. Somewhat less than one-half of the respondents to the survey indicated an awareness of the Business Improvement Program now being undertaken. It is likely that the level of awareness would be somewhat less for the survey non-respondents. It is clear that ongoing communication and liaison will be necessary to develop the full support and participation of businesses in the area.

Approximately one-half of the business operations in the study area are members of the East Edmonton Business Association. It would appear necessary that this representation increase or that a separate association or sub-committee of the E.E.B.A. with comprehensive coverage of the study area businesses be organized. At the present time only about one-quarter of the local merchants have indicated that they are prepared to contribute time and expertise to a Business Improvement Program. The majority of business operators, approximately 58 per cent, are unsure about participating and another 17 per cent have stated that they would not be interested in participating. An increase in the level of support for the program will be a necessary first step in any movement towards implementation of a Business Improvement Program.

In terms of financial support, few businesses are prepared at this time to indicate that they will contribute financially to a Business Improvement Program. This reluctance could stem from a number of factors including: a lack of financial resources; uncertainty as to the elements and objectives of the Business Improvement Program; and the fact that a minority of the business operators own their properties and most are therefore not in a position to commit to various financing measures.

The findings of the business survey suggest that the level of awareness and support for a Business Improvement Program must increase over time and should be a first area of priority. As the improvement program becomes better defined, and as the business community becomes more familiar with the elements and potential advantages of the program, the level of commitment and support on the part of the 118th Avenue merchants should increase.

5.2 NEIGHBORHOOD RESIDENTS

The residential neighborhoods which adjoin the 118 Avenue study area represent logical primary markets for the local businesses. For this reason, the nearby communities have been analyzed from an economic and demographic perspective in order to identify potential opportunities for expanding the commercial strength of 118 Avenue and identifying areas where improvements might be made.

In order to obtain statistical data regarding the nearby households, approximately 2900 survey questionnaires were sent out by mail to area residents. From these, 425 responses were obtained, a return rate of slightly under 15 per cent. This survey data, together with municipal and federal census information, provided the main sources of reference material for the following section of the report.

5.2.1 Population

The study team has referred to municipal census data in order to analyze the demographic characteristics of the areas surrounding 118 Avenue. The population of the area encompassed by 77 and 97 Streets, 122 Avenue in the north, and approximately 115 Avenue in the south, has been derived for each of the years from 1972 through to 1980. During that period the population of the contained neighborhood area has declined from about 12,300 in 1972 to approximately 10,500 at the present time. The population declined generally throughout the period 1972 to 1980, but has increased marginally since that time. There is no information to suggest that the population in the area will change dramatically in the short or medium-term future. In a longer term perspective, the population in the eastern portion of the study area may increase due to permitted higher densities adjacent to the light rail transit station at the Coliseum.

It is likely that the declining population in the surrounding residential areas has had an adverse impact on commercial activity in the local business sector.

5.2.2 Age

Available federal and municipal census data indicate that the neighborhoods surrounding 118 Avenue have a generally older population than the City as a whole. This pattern is typical of most inner city neighborhood areas. Shown below is a comparison of the age profile of the City of Edmonton compared to the 118 Avenue neighborhood areas:

Age	Edmonton	118 Ave. Neighborhood Areas
	---- % of population ---	
0 - 19	31.9	27.2
20 - 24	13.1	14.3
25 - 34	20.3	17.6
35 - 44	11.9	8.8
45 - 64	16.2	18.9
65 +	6.6	13.2
TOTALS	100.0	100.0

The age profile of the neighborhood area has implications for the commercial district in terms of the types of purchases made, the disposable incomes available, and accessibility (i.e. transportation modes, parking, etc.).

5.2.3 Length of Residence

The neighborhoods surrounding 118th Avenue would have to be described as well established. Over 70% of the respondents own their own home, while 56% of the respondents have lived in the area for more than five years. This result supports the perception of the business community that an established clientele is one of its major assets.

5.2.4 Ethnicity

The general 118 Avenue area should be considered an ethnic area, with relatively high concentrations of people of non-English or non-French descent. Census data indicate that approximately 35 per cent of the neighborhood residents claim a mother tongue other than English or French. This compares to a level of 19 per cent for Edmonton as a whole. The ethnic background of the area offers particular opportunities for businesses in the area and it appears that to some extent this has been capitalized on through the development of a number of ethnic retail outlets.

5.2.5 Occupations and Incomes

Various reports and documents that are available suggest that the general area around 118 Avenue consists of working class neighborhoods characterized by a relatively high proportion of people engaged in "blue collar" occupations and a relatively small proportion of the local labor force in professional and managerial positions. Average family incomes in the area are also below City-wide levels. A report pertaining to the Eastwood neighborhood indicates that average incomes in the area may be about 30 per cent below the City average. The relatively low income levels in the area surrounding the 118 Avenue business community has important implications in terms of potential expenditure volumes, and patterns.

5.2.6 Shopping Patterns

The residents of the surrounding areas appear to be frequent users of the 118 Avenue businesses. Roughly four-fifths of the local residents shop at or visit the businesses along 118 Avenue at least once a week. The majority of local residents patronize the Safeway store, local drug stores, the liquor store, and banks or financial institutions along 118 Avenue. Other facilities frequently used by local residents include convenience stores, service stations, hardware stores, and dry cleaning establishments.

Although only about one-third of local residents indicated that they regularly stopped in at more than one business while shopping along 118 Avenue, most residents indicated that on occasion they visited more than one business while shopping there. In terms of liquor purchases, groceries, banking services, drugs and cosmetics, and dry cleaning services, local residents make use of 118 Avenue businesses for a majority of their expenditures. In respect of items where comparison shopping is normally involved such as clothing, furniture and appliances and sporting goods equipment, little use is made of the 118 Avenue establishments.

5.2.7 Transportation Patterns

It is clear that even for residents of the nearby areas, transportation to and from the 118 Avenue business area is normally via automobile. Approximately two-thirds of local residents will, on occasion, drive to businesses along 118 Avenue. Minimal use currently is made of taxi or public transit. Walking accounts for roughly one-quarter of the shopping trips. The importance of the automobile -- even for nearby residents -- reinforces the concerns expressed by the businesses regarding parking availability and traffic congestion.

5.2.8 Concerns and Issues

The level of satisfaction of local residents with the 118 Avenue business area depends on the factor or consideration under review. A large majority of residents are satisfied with the convenience and accessibility of the study area, the prices and selection of local businesses, and the general quality of service offered. However, most residents indicate a fairly high level of dissatisfaction with the physical appearance of 118 Avenue and with the availability of parking space.

A number of respondents to the household survey provided observations regarding deficiencies of the 118 Avenue business area. The major factors mentioned included the following: inconvenient one-way roads which reduce access to 118 Avenue; inadequate parking in the business area; and the need for an improved quality and variety of establishments.

5.3 STUDY AREA SHOPPERS

During a three day period in December, 1982, a total of 450 shoppers were interviewed along 118 Avenue in the study area. Survey personnel were stationed at different points along the commercial strip. The data tabulated from the shopper interviews provided a basis for the discussions that follow.

5.3.1 Demographic Characteristics

The profile of shoppers using the businesses in the study area has been compared to that of the neighborhood residents. The shoppers are generally younger than the population in the surrounding areas. For example, more than three-quarters of the shoppers interviewed were between the ages of 20 and 49, while less than one-half of the adult population that responded to the household survey was in that age group. At the same time, there was a lower percentage of retired persons among the shoppers, and a higher proportion of students and both employed and unemployed adults. Interestingly, males accounted for approximately three-fifths of the shoppers interviewed although the high proportion of males was particularly noticeable during the weekend.

5.3.2 Shopping Patterns

Almost three-quarters of the shoppers along 118 Avenue visit the area at least once per week. As might be expected, persons who live further away tend to shop along 118 Avenue less frequently. However, even for those persons living more than one mile from the business area, almost one-half visit the business district on at least a weekly basis. Approximately one-quarter of the shoppers interviewed live more than three miles from 118th Avenue. These data suggest that shopper loyalty patterns are fairly strongly entrenched in respect of the business district.

The purchasing patterns of shoppers along 118 Avenue are generally consistent with those of the household residents in the area. A majority of the expenditures made by shoppers are for groceries, banking or financial services, drugs and cosmetics, and liquor. The expenditures made at local motor vehicle repair shops, sporting goods outlets, and restaurants do not appear to be related to the distance the shopper lives from the local business district. However, the percentage of purchases made in respect of most other types of facilities appears to be related to the distance the shopper lives from the local area. That is, the further the shopper lives from 118 Avenue the lower the proportion of expenditures made at a 118 Avenue business establishment.

By far the main reason cited by shoppers for patronizing the 118 Avenue business community relates to the general convenience or accessibility of the area. This suggests, of course, that this convenience factor be reinforced and safeguarded as an asset to the local business area. Other potential factors for shopping in the study area were mentioned to only a limited degree and these may be subject to corrective measures within the Business Improvement Program. Such factors include the variety of goods and services available, the general atmosphere of the business area, and the quality of service offered.

In declining order of importance, traffic congestion, the local parking situation, and the physical appearance of the 118 Avenue business area are the major negative features which have been cited by shoppers concerning the study area. By comparison, the quality of service, price levels, and the physical distribution of the local businesses have not been cited by shoppers as major problems. The apparent lack of concern regarding the scattered nature of the local businesses may, however, be due to the predominant use of vehicles by shoppers in the area. Other negative factors cited by some respondents included the poor selection of businesses in the area, the one-way streets, and the perceived level of crime and concentration of loiterers and transients in the area.

5.3.3 Transportation Patterns

More than two-thirds of the shoppers interviewed travel to the business area by automobile. Approximately one-fifth walk to the area from their homes, and the remainder arrive by bus or taxi. The importance of automobile transportation brings into focus the concerns regarding traffic congestion and the availability of parking along 118 Avenue.

As would be expected, a majority of shoppers along 118 Avenue are from the immediate area (57 per cent live within six blocks of the commercial area), but it should also be noted that a significant number of shoppers live a considerable distance away.

5.3.4 Recommended Improvements

In declining order of importance, road improvements, improved parking, beautification measures, and new businesses have been suggested by shoppers as offering the most desirable kinds of improvements to the 118 Avenue business area.

5.4 GENERAL OBSERVATIONS AND CONCLUSIONS

A number of general observations have been drawn from the survey results and other data collected, and are summarized below.

Characteristic or Factor	Suggested Implications
1. Profile of Local Businesses	Most business establishments in the study area are small, independently-owned operations. While this implies maximum potential flexibility and motivation on the part of the owner in terms of making desired business improvements, it also suggests that the local businesses compete on an individual and decentralized basis. Small, independent businesses more typically have management and financial deficiencies as well.
2. Ownership of Premises	The majority of businesses along 118 Avenue occupy premises on a rental or lease basis. Compared to property owners, lessees may have a lower commitment to the area and a more limited opportunity to effect certain types of property and area improvements, particularly where a financial levy or outlay is required of participants. The predominance of rented premises suggests also the need to involve property owners in any Business Improvement Program.
3. Mix of Businesses	Business operators in the study area perceive that the mix of establishments has worsened in recent years. On the other hand, there appears to be a reasonable level of satisfaction on the part of the shoppers and nearby residents with the selection of goods and services available on 118 Avenue. This may reflect the fact that local residents shop along the Avenue primarily for convenience goods and services (including groceries, banking services, drugs and cosmetics, and liquor), and feel that they have adequate access to other shopping areas for comparison shopping. In other words, shoppers may conceive of the study area as oriented primarily to convenience or low-order

items and be satisfied with the selection and mix of businesses in that context. However, there appears to be some scope and need for expanding the range of available businesses (for example, establishments oriented to senior citizens and particular ethnic population segments). At the same time, the study area currently offers a fairly wide selection of goods and services and there may be a need to increase the awareness of local shoppers as to the range available. It would appear that the many vehicle repair shops and dealerships on 118 Avenue operate largely independently from the remaining businesses and may not lend material support in terms of inducing other shopping activities in the area.

4. Business Confidence

Notwithstanding the economic problems pertaining to the study area and the general perception that it is getting more difficult to operate a business along 118th Avenue, the local merchants are surprisingly optimistic about their future prospects. This optimism, properly channeled, can provide major support to new Business Improvement Programs. Another positive sign relates to the plans of many businesses to expand, renovate, or change the kinds of goods and services offered in the next two or three years. This proposed investment is a good sign and can be used to reinforce or support other business improvement measures.

5. Shopping Patterns

Approximately one-half of the shoppers along 118 Avenue visit only one business per trip. It would appear that there is a limited amount of browsing in the study area and that there is potential for encouraging a greater amount of multi-stop and comparison shopping. At the same time, neighborhood residents and shoppers appear to make frequent use of local businesses: roughly three-quarters of the people questioned visit the business area at least once per week. This regular use of the business district evidences an established loyalty, which should be promoted and reinforced by the businesses through the provision of personalized service, an involvement in community affairs, and joint marketing approaches.

6. Neighborhood Economic Characteristics	The neighborhood area which adjoins the study area and comprises a primary market for the local businesses, is characterized by declining (or at best, stable) population, low average household incomes, and a relatively elderly age profile. These factors have negative implications for the 118 Avenue businesses in terms of the level and nature of local expenditures. Recognizing also the specific land use and transportation features of 118 Avenue, there appears to be limited scope for attracting many higher-order businesses, except in specialized areas related perhaps to ethnic groups and elderly people. The age profile of the nearby residents suggests opportunities to promote the further use of the study area businesses by addressing such factors as pedestrian safety, pricing, cleanliness, and personalized service.
7. Study Area Assets	The major assets of the 118 Avenue commercial strip, as perceived by the business operators are: personal service; convenience to shoppers; and an established clientele. These assets are consistent with the fact that many of the neighborhood residents have lived in the local area for several years. The convenience factor is by far, the major reason shoppers choose to use the local businesses. Accordingly, ways of reinforcing this asset by improving traffic and parking conditions would seem to be particularly worthwhile.
8. Physical Appearance	The physical appearance of the study area is considered to be unsatisfactory by business owners, neighborhood residents, and shoppers. Potential beautification measures should be addressed in the proposed Business Improvement Program.
9. Traffic and Parking	Traffic and parking problems are the major disincentives cited by shoppers to using the 118 Avenue business district, and this view is consistent with those of the local merchants. At the same time, it should be noted that other revitalization studies have found that parking and transportation are often erroneously blamed for

local business problems. However, a large majority of shoppers, even those from nearby areas, arrive by vehicle and it is important therefore to take steps to minimize the assessibility problems that many experience in shopping along 118 Avenue.

10. Awareness and Participation

More than 80 per cent of the local merchants believe that improvements are required to encourage more people to shop along 118 Avenue and this indicates that there is a good foundation of support for a Business Improvement Program. However, the present level of awareness among local merchants about the 118 Avenue Business Improvement Program needs to be raised. Furthermore, many business owners and operators are non-committal or uncertain about their stance in respect of a Business Improvement Program or in terms of contributing time or funds to improvement measures. Additional efforts will be required to inform merchants about the Program and encourage them to actively participate on an on-going basis.

6. RECOMMENDATIONS

6.1 INTRODUCTION

In the absence of a Business Improvement Program (B.I.P.), little change in the character or shopping dynamics of the 118 Avenue business district can be anticipated at this time. Some gradual redevelopment may occur and, over time, residential densities in the most easterly portion of the study area adjacent to the L.R.T. station may increase, heightening commercial activity in this locale.

Significant competition from suburban shopping centres and the downtown area (served by good public transit access) will continue to pose a threat to the 118th Avenue business area, although much of the commercial activity on 118 Avenue is concentrated in low-order goods and services where convenience is a major shopping factor. The area will continue to appeal to businesses requiring low rents. In sum, a continuation of the past trends and existing commercial function of the study area can be expected under a "no-improvement" scenario. This is likely to be unacceptable to those local residents or merchants supporting revitalization objectives.

To effect positive changes, it appears evident that some mix of initiatives or improvements are required to alter conditions in the area. It must be recognized, however, that the potential to successfully implement an improvement program may be constrained by the following factors:

- the continuing decline of 118th Avenue as the commercial heart of the area;

- the length, and dispersed, fragmented nature of the local business district (i.e. its poor functional organization);

- restrictions on the type, use, and extent of development as prescribed by the Land Use Bylaw;

- the lack of historically or physically unique features as the basis for a revitalization theme;

- the absence of a strong existing and cohesive organization of merchants and property owners;

- the limited availability of local financial and management resources, in part due to the size, tenure, and other characteristics of the commercial businesses.

6.2 ORGANIZATION

A necessary precondition to the design and implementation of a successful Business Improvement Program will be the development of a strong, cohesive, and active organization representing both merchants and property owners in the study area. A good start has been made in this regard, spurred by the E.E.B.A., but a greater awareness of the Program and participation by affected business operators is necessary.

Initially, a separate B.I.P. Committee within the E.E.B.A. should be organized and charged with the responsibility for the Business Improvement Program. Provision should be made for merchants and property owners who are not members of E.E.B.A. to participate on an equal basis in the Committee, in order not to prejudice potential membership.

Although the Northlands-Coliseum complex is not part of the study area, it lies on its periphery and generates a considerable amount of employment and recreational and commercial activity. It has available to it both financial and management resources, and its representatives have expressed interest in the 118th Avenue Business Improvement Program. It might also be invited to participate on the Committee.

Ultimately, as the Program evolves, the relative merits of re-organizing the Committee as an entity separate from the E.E.B.A. might be explored, if this autonomy will provide it with the necessary independent profile and authority needed to properly implement the Program. At the same time, it must be recognized that the E.E.B.A. is a large, influential organization, which may serve as a useful umbrella to the Committee's activities.

The Committee's initial emphasis should be concentrated on informing merchants and property owners about the Program, raising the overall level of awareness and interest in the Program, and increasing local participation in the Committee's activities. Continuation of the 118th Avenue B.I.A. Newsletter would be a logical first step in this direction.

As demand warrants, separate sub-committees dealing with promotion, marketing, planning, etc. may be established. These functions could be centralized in a B.I.P. 'storefront office' along 118th Avenue, which could also serve as a community information centre. Financial support for this enterprise may be gathered from B.I.P. membership fees and possibly from governmental sources (e.g. the federal Community Development Grant Program).

6.3 BUSINESS MANAGEMENT

Small, independent businesses of the type comprising the study area can generally benefit significantly from additional merchandising and management training and assistance. This support can be integrated within the Business Improvement Program and help complement other Program components.

The committee charged with overseeing the Business Improvement Program can encourage the improvement in the management capabilities of its members through a variety of measures, including the sponsorship of workshops, seminars, and guest speakers.

In addition, it is recommended that the active participation of merchants in a Retail Management Assistance Program, sponsored by the Alberta Department of Tourism and Small Business, be enlisted. When sufficient interest has been generated, an application for such a program should be submitted to the Department. For an estimated cost of approximately $35 to $45, each participating merchant obtains the following:

- an information dinner meeting with consultants and government personnel, who will detail the program and answer questions
- a one-half day session with the consultants, who will familiarize themselves with the individual business and discuss methods to improve it
- a subsequent meeting with the consultants to review financial concerns and to discuss the retail workshop
- a one-day retail workshop in which the consultants will review retailing solutions in these areas:
    - store layout
    - interior and exterior display

  - competition
  - advertising
  - pricing
  - personal selling
  - sales promotion
  - marketing

  (Each participant also receives a general workbook which can be used as a later backup reference)

- a further counselling visit by the consultants, who will show each business how to apply the solutions from the retail workshop

- a written list of individualized recommendations for business improvements

- a follow-up telephone call by the consultants to answer any questions or problems the merchant may be encountering in implementing the recommendations made

- a final visit by the consultants to conduct a program audit to determine the effectiveness of the program, and to assess the extent to which recommendations were implemented and the results

This program is a highly successful one, and should form an important part of the initial phases of the Business Improvement Program.

6.4 NEW BUSINESSES

The 118th Avenue business community presently contains a fairly broad range of convenience-type or low-order commercial services. It is desirable that new businesses be drawn to the area, to complement existing businesses and to reinforce the competitive draw of the area. The new businesses might build on the existing range of services or provide facilities unique to the area. The latter might include ethnic grocery stores, restaurants, and other services which appeal to the large ethnic population in the nearby area and the City at large. Clothing shops also appear to be needed, perhaps geared to elderly and lower-income persons.

The local executive of the Business Improvement Program should discuss and identify the types of businesses that appear to be needed and circulate this list to the membership, local realtors, and prospective investors. As an extension of this, a 'prospectus' for 118th Avenue designed to attract new businesses to the area may be considered. A brochure outlining lease rates, available locations, new development or upgrading projects, future B.I.P. revitalization plans, etc. might prove useful.

6.5 MARKETING

A wide range of potential marketing initiatives is available to the Business Improvement Program Committee. A few of these alternatives are discussed below.

6.5.1 Joint Advertising

One of the particular strengths of shopping centres and malls relates to the coordinated and joint advertising activities which they normally employ and which serve to reinforce the individual promotional activities of each business. With the exception of certain local outlets (for example, Safeway), the advertising activities carried out by the 118th Avenue business community appears to be limited and uncoordinated. It is recommended that the study area businesses investigate the potential for joint advertising in local and regional media, thus creating a larger marketing impact to potential customers and encouraging multi-store shopping. It is possible that the 118th Avenue businesses can justify their own newsletter and advertising supplement for distribution to neighborhood residents. Innovative marketing concepts, such as the exchanging of discount vouchers among area businesses might also be explored (for example, purchasers in one store may obtain a voucher worth a certain amount off particular items or overall expenditures at other Avenue businesses). Programs such as this will increase the awareness among consumers about the various local services available and increase the potential for each business to reinforce its neighbors' activities.

6.5.2 Selective Target Markets

Particular market segments which might deserve special emphasis from area businesses include: senior citizens residing in the adjacent neighborhoods; the employees and patrons of the Coliseum-Northlands facilities; lower income families; and ethnic households. Special programs aimed at the needs of senior citizens might include personalized service, senior citizen purchase discounts, home delivery, and special package handling services. The employees and events spectators at the Northlands facilities offer a major potential market for local businesses and suggest natural targets for local advertising activities. Services which cater to the particular needs of lower income families and ethnic households would also appear to be compatible with the market needs of people in the 118 Avenue area.

6.5.3 Promote Allegiance

There appears to be a relatively high level of customer loyalty or patronage in respect of the 118th Avenue businesses. The allegiance among neighborhood residents can be strengthened by encouraging the community involvement of merchants, and by supporting on-going dialogue and communications with neighborhood groups. It would be useful to communicate to local residents the types of economic benefits that both the residential neighborhoods and the business community would obtain through a higher level of local shopping.

6.5.4 Promotional Materials

The Business Improvement Program committee should investigate the feasibility of designing, printing, and distributing a combined map and brochure of the business area. The map would show the location of various businesses (together with a locational index), the availability of parking space, public transport routes, and local arterial structure. A brief background or history of the area could be included, together with a description of goods and services available, store hours, etc. The materials could be made available in local retail outlets and the B.I.P. office, and distributed to area residents, nearby hotels and motels, and tourist information offices.

6.5.5 Special Events

The local businesses should explore the merits of annually sponsoring one or two special events aimed at promoting the community use of the 118th Avenue businesses. The events could feature special sales promotions and discounts by all local businesses, extended hours of operation, and a variety of entertainment activities (pedestrian mall, temporary sidewalk cafes, community fair or handicrafts sale, street performers, etc.). These events might serve to make residents aware of the local commercial services available, and help to integrate the residential and business spheres of the community by fostering a close relationship between them.

FIGURE 22
SUMMER FESTIVAL STREET SCENE
(DOWNTOWN BELLEVILLE, ONTARIO)

6.5.6 Theme or Logo

The development of a unique theme or logo for the study area may help to provide an identity to the business community and a focus for promotional initiatives. The logo could be displayed as a part of all joint advertising programs and special events, and related product opportunities may also be available (t-shirts, buttons, bumper stickers, caps, etc.). The arts department of the local community college and schools could provide graphic design expertise and the studio facilities required to produce an appropriate logo.

6.6 A DEVELOPMENT STRATEGY

The length of the existing 118th Avenue shopping district, and it's 'uneven' development fabric preclude the implementation of substantial physical improvements designed to consolidate the area into a cohesive whole. Such an approach would be very expensive, and the costs disproportionate to the potential benefit. Also, capital-intensive revitalization plans would require substantial investments on the part of the business community and governments with the net result that many of the 'low rent' businesses - representing a significant proportion of a total business community - might be driven out of the area.

A successful revitalization effort then, would have to be more selective in its scope and focus of development. Perhaps the most appropriate strategy in this regard would be to key planned improvements to specific commercial sub-areas along the strip that already exhibit some special characteristics and development potential.

The analysis of the physical structure of 118th Avenue previously outlined in Chapter 4 identifies five possible sub-areas as focal points for revitalization.

6.6.1 Exhibition Village

The first sub-area extends from the eastern study limits to Grant McEwan College. It could build upon its strong relationship and proximity to the Exhibition Grounds as a 'service support centre' featuring eating establishments and associated facilities of the drive-in type. Landscaping of a 'commercial park' nature would serve to visually consolidate the area and provide an appropriate gateway to the Avenue.

Design controls for signage should also be considered, with the possible addition of street banners or flags to signify 'entrance' and provide the basis for an 'exhibition' theme. In terms of adjoining land uses, parking areas should be limited to the 118th Avenue frontage and screening elements should be placed between commercial and adjacent residential uses.

6.6.2 Cromdale Village

West of 'Exhibition Village', the commercial sub-area centred on 118th Avenue and 82nd Street should remain essentially as is, but enhanced by streetscape improvements and limited infill development in this heavily pedestrian-oriented precinct. Proposed improvements could be in line with the area's historic associations, promoted perhaps as 'Cromdale Village'. Redevelopment of the vacant land parcel between 81st and 82nd Street north of the Avenue should also be encouraged as an integral part of the revitalization scheme for this commercial unit.

6.6.3 Eastwood Park

Between the Safeway store and Cromdale Village some potential exists to develop an identifiable commercial unit that focusses on community-oriented facilities as activity centres and reinforces linkages to adjacent residential neighbourhoods. 'Eastwood Park' could accommodate additional main street retail development opposite the existing concentration of businesses between 85th and 86th Streets, north of 118th Avenue. Redevelopment here would provide a diversified retail mix and strengthen its drawing power. A double-sided pedestrian street environment would also thus be created. Store front improvements and an upgrading of the pedestrian environment would be in order. A strong landscaping treatment could serve as the basis for a theme for this area, integrating the Eastwood Community Hall grounds with commercial development.

6.6.4 Safeway Centre

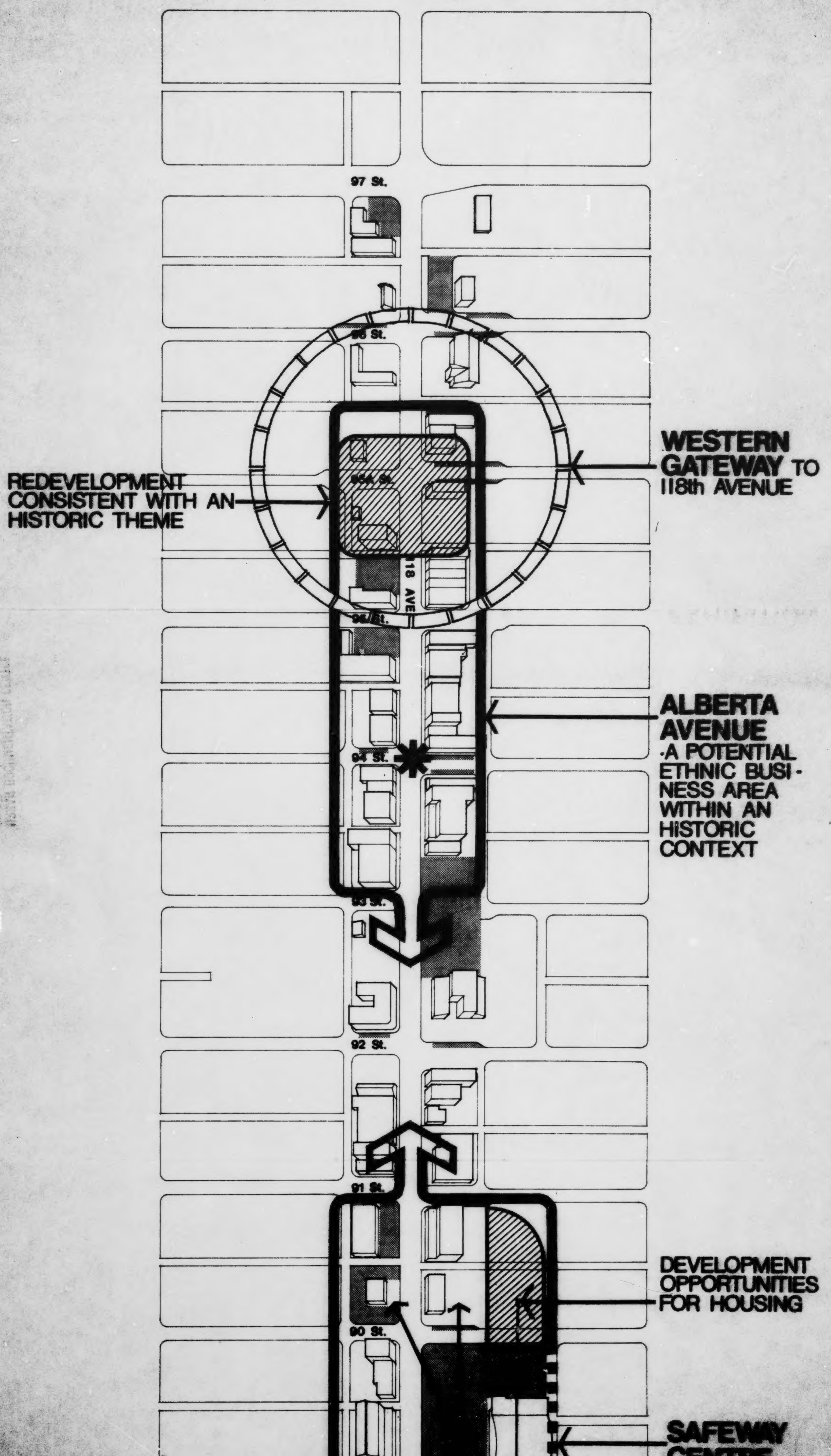
Immediately west of Eastwood Park, a fourth commercial unit could be developed with the Safeway store as its focal point. Uses compatable with the neighbourhood shopping centre mix of services should be encouraged here. Convenient access routes to and from the central parking area are essential to ensure the viability of this shopping centre within a commercial strip environment. The vitality and identity of the area could be considerably enhanced with the introduction of medium density multi-family or apartment-type residential development. This could be accommodated either directly on the Safeway site or adjacent to it.

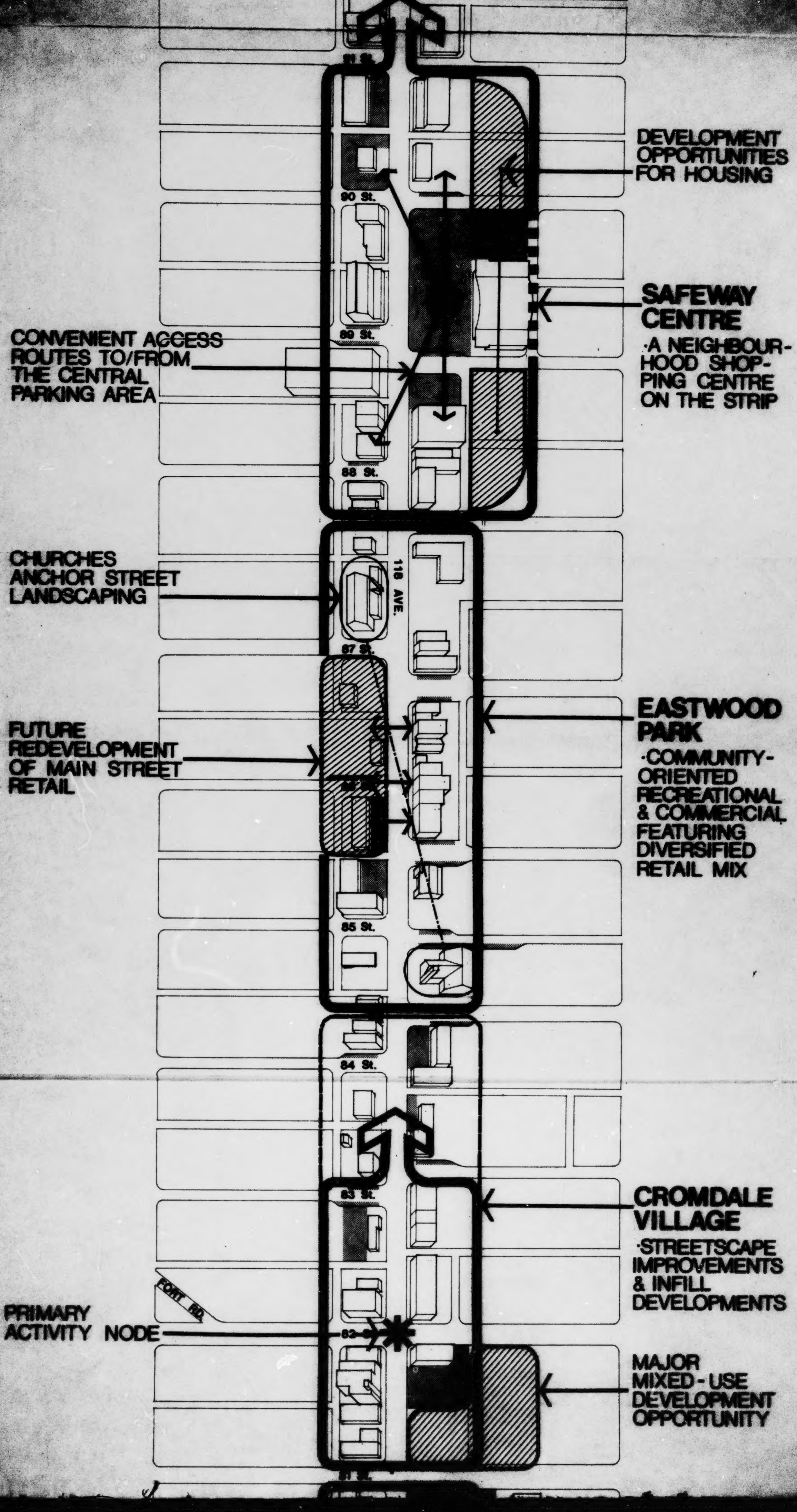
6.6.5 Alberta Avenue

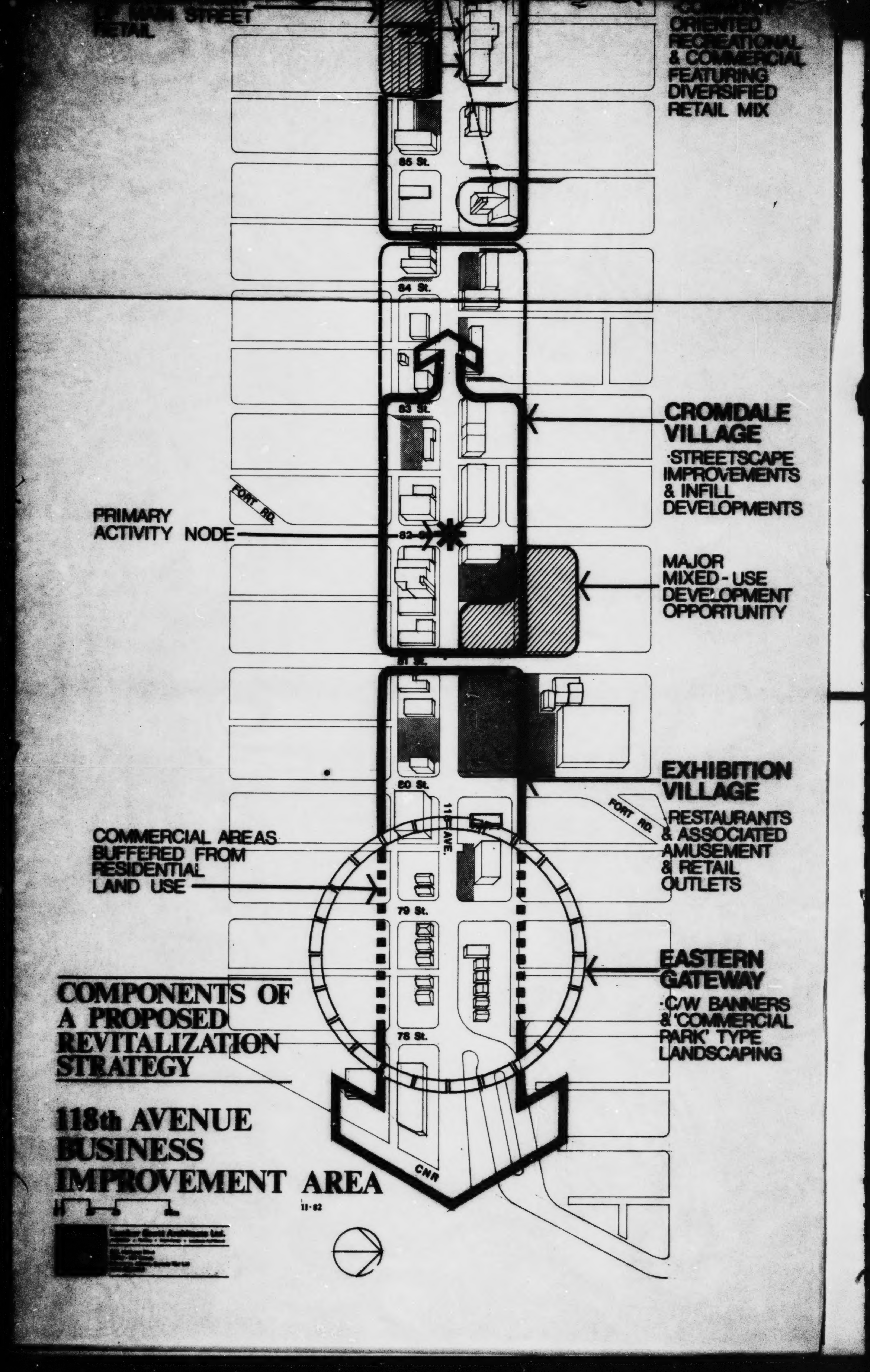
Anchoring the study area at its western terminus is the 'Alberta Avenue' commercial precinct. This area is characterized by a strong 'main street' commercial character relative to other areas identified, offering perhaps the best opportunity for developing a historic main street theme. Store front improvements, widening of sidewalks, and landscaping, combined with some infill redevelopment, would be most effective here. The treatment of the area could also be somewhat more eclectic than proposed elsewhere in support of ethnic businesses that can contribute to the character of the area. Redevelopment should be particularly encouraged at the west end of this zone consistent with a historic theme to create a western 'gateway' to the Avenue - an identifiable entry point markedly different in character from its east end counterpart.

Figure 23 summarizes, in graphic form, the components of the general development strategy for the revitalization of 118th Avenue as described above. At present, the best vehicle for implementing this development strategy would appear to be an Area Redevelopment Plan Bylaw (A.R.P.B.). A liberal interpretation of the scope of this planning mechanism comes closest to accommodating the widest possible range of revitalization objectives. The A.R.P.B. process should serve as an adequate forum for the participation of individual property owners, and the B.I.P. membership as a whole, under the guidance of the City Planning Department.

As planning progresses, specific physical improvements may be identified and priorities assigned according to financial requirements and constraints. The City should be encouraged to carry out those improvements considered to be its logical responsibility. Individual property owners should be encouraged, and where necessary and possible, assisted to improve upon the quality of their premises and surroundings. For those improvements assignable to the overall B.I.P. membership, an implementation and finance sub-committee may be required to take charge of carrying out and funding the projects. Recognizing the possible difficulties in assessing benefiting properties for costs on a shared basis, it may also be necessary to formulate some unique financing plans, possibly in conjunction with local community groups.


WESTERN GATEWAY TO 118th AVENUE
REDEVELOPMENT CONSISTENT WITH AN HISTORIC THEME
ALBERTA AVENUE
-A POTENTIAL ETHNIC BUSINESS AREA WITHIN AN HISTORIC CONTEXT
DEVELOPMENT OPPORTUNITIES FOR HOUSING
SAFEWAY
97 St.
96 St.
95A St.
118 AVE
95 St.
94 St.
93 St.
92 St.
91 St.
90 St.


DEVELOPMENT OPPORTUNITIES FOR HOUSING
SAFEWAY CENTRE
·A NEIGHBOURHOOD SHOPPING CENTRE ON THE STRIP
CONVENIENT ACCESS ROUTES TO/FROM THE CENTRAL PARKING AREA
CHURCHES ANCHOR STREET LANDSCAPING
EASTWOOD PARK
·COMMUNITY-ORIENTED RECREATIONAL & COMMERCIAL FEATURING DIVERSIFIED RETAIL MIX
FUTURE REDEVELOPMENT OF MAIN STREET RETAIL
CROMDALE VILLAGE
·STREETSCAPE IMPROVEMENTS & INFILL DEVELOPMENTS
PRIMARY ACTIVITY NODE
MAJOR MIXED-USE DEVELOPMENT OPPORTUNITY
FORT RD.
91 St.
90 St.
89 St.
88 St.
118 AVE.
87 St.
86 St.
85 St.
84 St.
83 St.
82 St.
81 St.


OF MAIN STREET
RETAIL
·COMMUNITY
ORIENTED
RECREATIONAL
& COMMERCIAL
FEATURING
DIVERSIFIED
RETAIL MIX
85 St.
84 St.
83 St.
FORT RD.
PRIMARY
ACTIVITY NODE
82 St.
CROMDALE
VILLAGE
·STREETSCAPE
IMPROVEMENTS
& INFILL
DEVELOPMENTS
MAJOR
MIXED - USE
DEVELOPMENT
OPPORTUNITY
81 St.
80 St.
118 AVE.
EXHIBITION
VILLAGE
·RESTAURANTS
& ASSOCIATED
AMUSEMENT
& RETAIL
OUTLETS
FORT RD.
COMMERCIAL AREAS
BUFFERED FROM
RESIDENTIAL
LAND USE
79 St.
78 St.
EASTERN
GATEWAY
·C/W BANNERS
& 'COMMERCIAL
PARK' TYPE
LANDSCAPING
CNR
11·82
[illegible] Architects Ltd.

COMPONENTS OF A PROPOSED REVITALIZATION STRATEGY

118th AVENUE BUSINESS IMPROVEMENT AREA

COMPONENTS OF
A PROPOSED
REVITALIZATION
STRATEGY

138th AVENUE
BUSINESS
IMPROVEMENT

6.7 ACCESS TO SHOPPING

At a general level, it is recommended that a traffic origin-destination study be commissioned for the study area to provide the necessary information required to assess the extent of traffic congestion, identify problem areas, and define the range of possible solutions available to correct deficiencies and enhance circulation in respect of a preferred development strategy.

In advance of such a study, it may however be concluded that 118th Avenue itself must continue to support a certain level of through traffic in addition to its commercial access role. It may also be suggested that the truck route designation be removed from 118th Avenue through the study area, with truck traffic reassigned to parallel arterials specifically designed for this purpose (e.g. the Yellowhead Trail).

In terms of transit, it is recommended that service along 118th Avenue be maintained at its current level as a minimum condition. Subject to the approval of a development strategy, the frequency of service could perhaps be increased, and transit stops coordinated with designated activity nodes. If ridership and revitalization activities warrant, transit could be upgraded to a 'shuttle bus' type service, originating at the Coliseum L.R.T. station and serving the 118th Avenue business area exclusively.

For the pedestrian, revitalization plans including a streetscape improvement component should endeavour to establish exclusive pedestrian right-of-ways linking adjacent residential neighbourhoods and parking facilities to 118th Avenue. Where appropriate, mid-block pedestrian malls should be integrated with redevelopment to increase accessibility to the street.

6.8 PARKING

Specific recommendations for improving the parking situation cannot be made in advance of an agreement with respect to an overall revitalization strategy. In any case, it is our contention that the sensitive management of currently available parking resources can go a long way towards the betterment of parking amenities in the area. As previously mentioned in Chapter 4, it may be appropriate to establish an 118th Avenue parking authority to manage and develop parking resources serving the business community. An efficient parking authority can, in fact, develop new parking facilities from its own revenue base, often without the support of government subsidies.

As a final comment, if eventual revitalization plans result in a 'no improvement' scenario, then planning initiatives for parking should focus on the following measures: application of various traffic management techniques to improve access; cooperative efforts among adjoining business premises to rationalize existing inefficient parking areas; creative manipulation of parking restrictions to improve utilization; negotiations to permit shopper parking in 'semi-public' lots; and possible expansion of designated commercial land use districts in support of on-site parking opportunities.

7. FUTURE ACTIVITIES

7.1 REVITALIZATION WORKSHOPS

On the basis of this study's findings and recommendations, a series of workshops should be organized to establish specific revitalization objectives and the planning mechanisms appropriate to their realization. These workshops would involve the 118th Avenue business community at large, community leaders representing the interests of adjacent neighbourhoods, City planners, and other special interest groups. The outcome of these workshops would serve to set the stage for a program of promotional activities advertising the attractions and planned improvements proposed for the business improvement area. They would also serve to define specific improvement projects scheduled for eventual implementation.

7.2 NEIGHBORHOOD AND SHOPPERS ATTITUDES

The local business community should periodically survey neighborhood residents and shoppers to monitor changes in shopping patterns, attitudes toward local businesses, and concerns regarding the study area. This information will permit the merchants and property owners to adjust the Business Improvement Program to respond to particular problem areas.

7.3 ECONOMIC CONDITIONS ALONG 118th AVENUE

A similar monitoring exercise should be carried out by the Business Improvement Program members in terms of assessing changes in key factors including:

- business turnover rates;
- vacancies;

- new businesses opening, existing businesses closing;
- attitudes and concerns of merchants.

Information such as this will provide a basis on which to evaluate the success or failure of the B.I.P. and to make necessary readjustments.

7.3 OTHER STUDIES

The City of Edmonton Transportation Management Department, or alternatively a private consulting firm, should undertake a functional planning study of 118th Avenue to include an analysis of traffic origins and destinations. Subsequently, a parking study may be required to 'fine tune' land use plans to best serve the needs of the business improvement area. Both of these efforts should be undertaken in advance of, or concurrent with, other planning activities.

Finally, urban design studies will be required at some point. Expertise in this area can possibly be provided through the in-house resources of the City Planning Department, or perhaps via design workshops backed by qualified volunteers.

8. APPENDIX A - STUDY SURVEYS

8.1 INTRODUCTION

As an integral part of the study program, the consultants designed and implemented three surveys.

Households in the residential areas adjoining 118th Avenue were surveyed to determine their demographic characteristics, shopping patterns, and perceptions regarding the local business district. The nearby residents, of course, comprise the most logical target market of the 118th Avenue businesses.

A survey of shoppers along 118th Avenue was also implemented. The objective of this survey was to determine the characteristics and attitudes of the existing patrons of the local businesses, and also to permit cross-comparisons with the neighborhood survey data.

Finally, a survey of business owners and operators in the study area was carried out. The major purpose of this survey was to derive an operational profile of the local business district, obtain the perceptions and attitudes of the merchants regarding the problems and opportunities of the study area, and determine the level of awareness of the Business Improvement Program and the nature of potential participation by 118th Avenue businesses.

The survey procedures and results are discussed in this section of the report.

8.2 COMMUNITY SURVEY

8.2.1 Description

In early December, 1982 approximately 2900 questionnaires were sent by mail to household residents in the 118th Avenue area. A copy of the questionnaire is provided on the following page. The questionnaires included a postage-paid envelope for return mailing.

The questionnaires were blanket-mailed to postal code zones north and south of 118th Avenue. These zones generally extend to 125th Avenue in the north and 112th Avenue in the south. Zones covered by the survey were staggered to obtain a reasonable geographic cross-section of responses.

A total of 425 completed questionnaires were returned, yielding a satisfactory response rate of slightly under 15 per cent.

The data on the individual survey forms were entered on to computer files, and various tabulations and analyses were performed. The key results and detailed tabulations are provided in Sections 8.2.2 and 8.3.2.

COMMUNITY SHOPPING SURVEY

This Survey Will Be Kept Confidential

Instructions: Please have an adult member of the household respond. Answer as many questions as you can. Please return questionaire in the **postage paid envelope by December 15, 1982.**

OFFICE USE ONLY
Area ______ 1

SECTION A. Household Information

1. **How many persons including yourself are there in your household?**
   __________ persons — 2-3

2. **Do you rent or own your dwelling unit?** (please check)
   Rent ☐ 1 Own ☐ 2 — 4

3. **Does any member of the household own a motor vehicle?**
   Yes ☐ 1 No ☐ 2 — 5

4. **How many years have you lived at this location?**
   0-2 years ☐ 1 3-5 years ☐ 2
   6-10 years ☐ 3 More than 10 years ☐ 4 — 6

5. **Are you:**
   Employed full-time outside the home? ☐ 1 Employed part-time outside the home? ☐ 2 — 7
   A student? ☐ 3 A housewife? ☐ 4
   Retired? ☐ 5 Unemployed? ☐ 6
   Other? ☐ 7

6. **Which age group are you in?**
   0-19 ☐ 1 20-34 ☐ 2 35-49 ☐ 3 50-64 ☐ 4 65+ ☐ 5 — 8

7. **Are you:**
   Female ☐ 1 Male ☐ 2 — 9

SECTION B. Shopping Patterns

8. **Approximately how many blocks do you live from 118th Avenue?**
   Less than one block ☐ 1 1 to 2 blocks ☐ 2 3 to 4 blocks ☐ 3 — 10
   5 to 6 blocks ☐ 4 More than 6 blocks ☐ 5

9. **How often do you shop at or visit any of the businesses along 118th Avenue?**
   Almost every day ☐ 1 Once or twice a week ☐ 2 Once or twice a month ☐ 3 — 11
   Seldom or infrequently ☐ 4 Never ☐ 5

   If you never shop along 118th Avenue please go to question 12.

   If you do shop on 118th Avenue, what businesses or types of businesses do you use?
   (Check more than one category if appropriate)

Convenience grocery store	☐	12	12
Safeway's	☐	13	13
Gasoline service station	☐	14	14
Motor vehicle repair shop	☐	15	15
Dry Cleaning	☐	16	16
Clothing store	☐	17	17
Hardware	☐	18	18
Shoe Repair	☐	19	19
Furniture/Appliances	☐	20	20
Drugstore	☐	21	21
Liquor store	☐	22	22
Sporting goods store	☐	23	23
Barbershop or beauty salon	☐	24	24
Restaurant	☐	25	25
Banks or other financial institutions	☐	26	26
Accountants or real estate office	☐	27	27

10. **When you do shop in the 118th Avenue commercial area, do you stop in at more than one business while you are there?**
    Yes ☐ 1 No ☐ 2 Sometimes ☐ 3 — 28

11. **How do you normally travel to the 118th Avenue business area to shop?**
    Car ☐ 1 Taxi ☐ 2 Bus/LRT ☐ 3 Walk ☐ 4 Other ☐ 5 — 29-30

12. Where did you make your most recent purchase or shopping trip for the following? (Please circle the appropriate location for each item.)

	Downtown	118th Avenue	One of the major shopping centres or malls (such as Kingsway Garden Mall, Londonderry, North Town/Northwood Shopping Centre, etc.)	Elsewhere	Not Sure/ No Answer	OFFICE USE ONLY
Food (less than $5)	1	2	3	4	5	31
Food (more than $5)	1	2	3	4	5	32
Gasoline Service Station	1	2	3	4	5	33
Motor Vehicle Repair	1	2	3	4	5	34
Bank or Financial Institution	1	2	3	4	5	35
Clothing	1	2	3	4	5	36
Hardware	1	2	3	4	5	37
Furniture/Appliances	1	2	3	4	5	38
Drug/Cosmetics	1	2	3	4	5	39
Gov't Liquor Store	1	2	3	4	5	40
Sporting Goods	1	2	3	4	5	41
Barber/Beauty Shop	1	2	3	4	5	42
Dry Cleaning	1	2	3	4	5	43
Restaurant	1	2	3	4	5	44
Accountant or Tax Consultant	1	2	3	4	5	45
Real Estate Agent	1	2	3	4	5	46

13. Having regard to the 118th Avenue business area, how satisfied are you with the following things? (Please circle the appropriate number.)

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Don't Know/ Not Sure	
a) Convenience/accessibility	1	2	3	4	5	6	47
b) Prices	1	2	3	4	5	6	48
c) Selection of goods and services	1	2	3	4	5	6	49
d) Parking	1	2	3	4	5	6	50
e) Physical appearance	1	2	3	4	5	6	51
f) Quality of service	1	2	3	4	5	6	52

14. Please indicate, by circling the appropriate number, whether you agree or disagree with the following statements.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know	
Prices of goods and services along 118th Avenue are competitive with those in other shopping areas.	1	2	3	4	5	6	53
Businesses along 118th Avenue provide a high quality and personalized service.	1	2	3	4	5	6	54
It is convenient for me to shop along 118th Avenue.	1	2	3	4	5	6	55
The 118th business area has a nice atmosphere and physical appearance.	1	2	3	4	5	6	56
Businesses along 118th Avenue are readily accessible to me.	1	2	3	4	5	6	57
The 118th Avenue business area offers a good selection and choice of goods and services.	1	2	3	4	5	6	58

8.2.2 Survey Findings

A summary of the responses to the household survey is given below. The reader is referred to the computer tabulations presented in Section 8.2.3 for more detailed results.

Question 1. How may persons including yourself are there in your household?

The mean or average number of persons per household is 2.5. The household size is smaller than for the City as a whole, and is less than for the households of shoppers who patronize 118th Avenue businesses.

Question 2. Do you rent or own your own dwelling unit?

Responses:	Rent	29%
	Own	71%
	TOTAL	100%

Question 3. Does any member of the household own a motor vehicle?

Responses:	Own a motor vehicle	82%
	Do not own a motor vehicle	18%
	TOTAL	100%

Question 4. How many years have you lived at this location?

Fifty-six percent of households have lived at their present location for more than five years.

Other statistical tests indicate that there is no significant relationship between years of residence and the frequency of visits to 118th Avenue businesses.

Question 5. What is your employment or activity status?

Responses:		
	Employed full or part-time	54%
	Unemployed	6%
	Student	2%
	Housewife	7%
	Retired	29%
	Other	3%
	TOTAL	101% *

* due to rounding.

A much higher proportion of retired persons is evident among neighborhood residents compared to the population of shoppers.

Question 6. What age group are you in?

The survey tabulations confirm that the surrounding neighborhoods have a relatively high age profile, with approximately one-half of respondents over the age of 50.

Neighborhood residents appear to be generally older than the shoppers along 118th Avenue.

Statistical tests carried out indicate that there is a relationship between respondent age and the number of businesses visited when shopping; that is, older people tend to visit more than one business on their shopping trips.

Question 7. What is your sex?

The household survey responses are evenly split between males and females.

By comparison, the shopping survey revealed a somewhat higher ratio of male to female shoppers.

Question 8. Approximately how many blocks do you live from 118th Avenue?

The results of this question were used to carry out various cross-tabulations and statistical comparisons with other survey data.

Question 9. How often do you shop at or visit any of the businesses along 118th Avenue?

It is significant that 79% of neighborhood residents shop along 118th Avenue at least once per week.

Question 9b. If you do shop on 118th Avenue, what businesses or types of businesses do you use?

TYPE OF BUSINESS	% OF RESPONDENTS USING TYPE OF BUSINESS
Store	42
Safeway's	87
Gasoline Service Station	40
Motor Vehicle Repair	11
Dry Cleaning	39
Clothing Store	7
Hardware	42
Shoe Repair	27
Furniture/Appliances	6
Drugstore	75
Liquor Store	66
Sporting Goods Store	7
Barbershop or Beauty Salon	33
Restaurant	34
Banks or Other Financial Institutions	64
Accountants or Real Estate Office	5

The local residents rely on 118th Avenue businesses primarily for "low-order" or convenience-type goods and services, which do not normally involve comparison shopping.

The Safeway store, drug stores, liquor store, and banks along 118th Avenue are used by a majority of neighborhood residents.

Question 10. When you do shop in the 118th Avenue commercial area, do you stop in at more than one business while you are there?

Responses:		
	Yes	32%
	Sometimes	56%
	No	12%
	TOTAL	100%

Question 11. How do you normally travel to the 118th Avenue business area to shop?

	% OF RESPONDENTS INDICATING USE OF TRANSPORT MODE*
Car	73
Taxi	2
Bus/LRT	9
Walk	58

*Numbers add to more than 100% because some respondents indicated more than one mode of transport.

The survey results show that, even for local neighborhood residents, automobile travel is the predominate transport mode used for shopping along 118th Avenue.

Question 12. Where did you make your most recent purchase or shopping trip for the follwing items?

SHOPPING CATEGORY	% OF RESPONDENTS INDICATING 118TH AVE.
Food (less than $5)	54
Food (more than $5)	67
Gasoline Service Station	42
Motor Vehicle Repair	19
Bank or Financial Institution	66
Clothing	5
Hardware	36
Furniture/Appliances	8
Drug/Cosmetics	62
Government Liquor Store	89
Sporting Goods	14
Barber/Beauty Shop	38
Dry Cleaning	54
Restaurant	31
Accountant or Tax Consultant	14
Real Estate Agent	15

Neighborhood residents rely on study area businesses for a majority of their food, liquor, and drug and cosmetic purchases and for most of their dry cleaning and banking services. High-order, shopping-type goods and services are purchased in local businesses to only a limited degree.

The results of the household survey are generally consistent with those for the shopping survey, discussed later.

Question 13. Having regard to the 118th Avenue business area, how satisfied are you with the following things?

	% OF RESPONDENTS INDICATING "SATISFIED" OR "VERY SATISFIED"
Convenience/Accessibility	69
Prices	53
Selection	54
Parking	24
Physical Appearance	37
Quality of Service	68

More than two-thirds of neighborhood residents appear to be satisfied with the convenience and quality of service offered by 118th Avenue businesses, while only a minority indicate satisfaction with parking conditions and the physical appearance of the study area.

Question 14. Please indicate whether you agree or disagree with the following statements.

STATEMENT	% OF RESPONDENTS AGREEING OR STRONGLY AGREEING
Prices along 118th Avenue are competitive	62
Businesses along 118th Avenue provide a high quality and personalized service	50
It is convenient for me to shop along 118th Avenue	71
The 118th Avenue business area has a nice atmosphere and physical appearance	21
Businesses along 118th Avenue are readily accessible to me	68
The 118th Avenue business area offers a good selection and choice of goods and services	45

Clearly deficient in terms of satisfaction is the perceived atmosphere and physical appearance of the study area. The convenience and accessibility of the area is acknowledged by a majority of respondents.

8.2.3 Survey Tabulations

The computerized tabulations of the survey responses are provided on the following pages. To interpret the responses, reference should also be made to the questionnaire itself for the actual wording of the questions and possible answers.

The 'absolute frequency' cited in the computer tabulations refers to the actual number of survey responses for each answer. The 'relative frequency' provides the percentage breakdown of responses for each question, but it includes as well the non-responses. The 'adjusted frequency' provides a percentage breakdown of the answers after eliminating invalid answers and non-responses.

```
Household Survey

01        # of persons in Household

                                            RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE     FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY     (PERCENT)   (PERCENT)    (PERCENT)

                         1          85          20.0        20.3         20.3
                         2         168          39.5        40.2         60.5
                         3          77          18.1        18.4         78.9
                         4          56          13.2        13.4         92.3
                         5          25           5.9         6.0         98.3
                         6           5           1.2         1.2         99.5
                         7           1           0.2         0.2         99.8
                         8           1           0.2         0.2        100.0
                         0           7           1.6     MISSING        100.0
                               -------       -------     -------
                     TOTAL         425         100.0       100.0

VALID CASES     418      MISSING CASES      7
```

CODE =
Number of
Persons

```
Household Survey

02        Rent or own dwelling

                                            RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE     FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY     (PERCENT)   (PERCENT)    (PERCENT)

Rent                     1         123          28.9        29.1         29.1
Own                      2         300          70.6        70.9        100.0
                         0           1           0.2     MISSING        100.0
                         9           1           0.2     MISSING        100.0
                               -------       -------     -------
                     TOTAL         425         100.0       100.0

VALID CASES     423      MISSING CASES      2
```

```
Household Survey

03        Owns a motor vehicle?

                                            RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE     FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY     (PERCENT)   (PERCENT)    (PERCENT)

Yes                      1         341          80.2        81.6         81.6
No                       2          77          18.1        18.4        100.0
                         0           5           1.2     MISSING        100.0
                         9           2           0.5     MISSING        100.0
                               -------       -------     -------
                     TOTAL         425         100.0       100.0

VALID CASES     418      MISSING CASES      7
```

```
Household Survey

04        Years of residence

                                            RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE     FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY     (PERCENT)   (PERCENT)    (PERCENT)

0-2 Years                1         114          26.8        27.3         27.3
3-5 Years                2          70          16.5        16.7         44.0
6-10 Years               3          37           8.7         8.9         52.9
Over 10 years            4         197          46.4        47.1        100.0
                         0           6           1.4     MISSING        100.0
                         9           1           0.2     MISSING        100.0
                               -------       -------     -------
                     TOTAL         425         100.0       100.0

VALID CASES     418      MISSING CASES      7
```

```
Household Survey

05        Employment status

                                          RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Full-time                1       191        44.9        49.9        49.9

Part-time                2        14         3.3         3.7        53.5

Student                  3         6         1.4         1.6        55.1

Housewife                4        28         6.6         7.3        62.4

Retired                  5       110        25.9        28.7        91.1

Unemployed               6        22         5.2         5.7        96.9

Other                    7        12         2.8         3.1       100.0

                         0         5         1.2     MISSING       100.0

                         9        37         8.7     MISSING       100.0
                               -------     -------     -------
                     TOTAL       425       100.0       100.0

VALID CASES     383      MISSING CASES     42
```

```
Household Survey

06        Age

                                          RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

0-19                     1         9         2.1         2.2         2.2

20-34                    2       150        35.3        36.6        38.8

35-49                    3        45        10.6        11.0        49.8

50-64                    4       105        24.7        25.6        75.4

65+                      5       101        23.8        24.6       100.0

                         0         4         0.9     MISSING       100.0

                         9        11         2.6     MISSING       100.0
                               -------     -------     -------
                     TOTAL       425       100.0       100.0

VALID CASES     410      MISSING CASES     15
```

```
Household Survey

07        Sex

                                          RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Female                   1       194        45.6        50.0        49.7

Male                     2       194        45.6        50.0       100.0

                         0         8         1.9     MISSING       100.0

                         9        29         6.8     MISSING       100.0
                               -------     -------     -------
                     TOTAL       425       100.0       100.0

VALID CASES     388      MISSING CASES     37
```

```
Household Survey

08        Distance from 118 ave

                                         RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY  FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE FREQUENCY  (PERCENT)  (PERCENT)    (PERCENT)
< 1 Block                  1        77       18.1       18.2         18.2
1-2 Blocks                 2       119       28.0       28.1         46.3
3-4 Blocks                 3       120       28.2       28.4         74.7
5-6 Blocks                 4        78       18.4       18.4         93.1
> 6 Blocks                 5        29        6.8        6.9        100.0
                           0         2        0.5    MISSING        100.0
                                -------    -------    -------
                       TOTAL       425      100.0      100.0

VALID CASES     423      MISSING CASES     2
```

```
Household Survey

09        Frequency of visits to 118ave businesses

                                         RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY  FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE FREQUENCY  (PERCENT)  (PERCENT)    (PERCENT)
Daily                      1        88       20.7       21.1         21.1
Weekly                     2       240       56.5       57.6         78.7
 Monthly                   3        55       12.9       13.2         91.8
Infrequently               4        29        6.8        7.0         98.8
Never                      5         5        1.2        1.2        100.0
                           0         5        1.2    MISSING        100.0
                           6         3        0.7    MISSING        100.0
                                -------    -------    -------
                       TOTAL       425      100.0      100.0

VALID CASES     417      MISSING CASES     8
```

```
Household Survey

09A       Convenience store

                                         RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY  FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE FREQUENCY  (PERCENT)  (PERCENT)    (P3RCENT)
Do NOT use                 0       245       57.6       57.6         57.6
Use                        1       180       42.4       42.4        100.0
                                -------    -------    -------
                       TOTAL       425      100.0      100.0

VALID CASES     425      MISSING CASES     0
```

```
Household Survey

09B       Safeways

                                         RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY  FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE FREQUENCY  (PERCENT)  (PERCENT)    (PERCENT)
Do NOT use                 0        56       13.2       13.2         13.2
Use                        1       369       86.8       86.8        100.0
                                -------    -------    -------
                       TOTAL       425      100.0      100.0

VALID CASES     425      MISSING CASES     0
```

```
Household Survey

08C       Gasoline service station

                                             RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE     FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY     (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use                 0        257          60.5       60.5        60.5

Use                        1        168          39.5       39.5       100.0
                              ---------      --------   --------
                       TOTAL        425         100.0      100.0

VALID CASES      425       MISSING CASES      0
```

```
Household Survey

08D       Motor vehicle repair shop

                                             RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE     FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY     (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use                 0        377          88.7       88.7        88.7

Use                        1         48          11.3       11.3       100.0
                              ---------      --------   --------
                       TOTAL        425         100.0      100.0

VALID CASES      425       MISSING CASES      0
```

```
Household Survey

08E       Dry cleaning

                                             RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE     FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY     (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use                 0        259          60.9       60.9        60.9

Use                        1        166          39.1       39.1       100.0
                              ---------      --------   --------
                       TOTAL        425         100.0      100.0

VALID CASES      425       MISSING CASES      0
```

```
Household Survey

08F       Clothing store

                                             RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE     FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY     (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use                 0        396          93.2       93.2        93.2

Use                        1         29           6.8        6.8       100.0
                              ---------      --------   --------
                       TOTAL        425         100.0      100.0

VALID CASES      425       MISSING CASES      0
```

```
Household Survey

08G       Hardware

                                             RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE     FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY     (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use                 0        247          58.1       58.1        58.1

Use                        1        178          41.9       41.9       100.0
                              ---------      --------   --------
                       TOTAL        425         100.0      100.0

VALID CASES      425       MISSING CASES      0
```

```
Household Survey

Q8H       Shoe repair

                                        RELATIVE   ADJUSTED  CUMULATIVE
                            ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL      CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use             0        311        73.2       73.2        73.2

Use                    1        114        26.8       26.8       100.0
                            -------     -------    -------
                   TOTAL        425       100.0      100.0

VALID CASES     425      MISSING CASES     0
```

```
Household Survey

Q8I       Furniture-appliances

                                        RELATIVE   ADJUSTED  CUMULATIVE
                            ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL      CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use             0        400        94.1       94.1        94.1

Use                    1         25         5.9        5.9       100.0
                            -------     -------    -------
                   TOTAL        425       100.0      100.0

VALID CASES     425      MISSING CASES     0
```

```
Household Survey

Q8J       Drug store

                                        RELATIVE   ADJUSTED  CUMULATIVE
                            ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL      CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use             0        108        25.4       25.4        25.4

Use                    1        317        74.6       74.6       100.0
                            -------     -------    -------
                   TOTAL        425       100.0      100.0

VALID CASES     425      MISSING CASES     0
```

```
Household Survey

Q8K       Liquor store

                                        RELATIVE   ADJUSTED  CUMULATIVE
                            ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL      CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use             0        143        33.6       33.6        33.6

Use                    1        282        66.4       66.4       100.0
                            -------     -------    -------
                   TOTAL        425       100.0      100.0

VALID CASES     425      MISSING CASES     0
```

```
Household Survey

Q8L       Sporting goods store

                                        RELATIVE   ADJUSTED  CUMULATIVE
                            ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL      CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use             0        395        92.9       92.9        92.9

Use                    1         30         7.1        7.1       100.0
                            -------     -------    -------
                   TOTAL        425       100.0      100.0

VALID CASES     425      MISSING CASES     0
```

```
Household Survey

Q9M       Barber-Beauty shop

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE   FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use                0        283       66.6       66.6        66.6

Use                       1        142       33.4       33.4       100.0
                               -------    -------    -------
                      TOTAL        425      100.0      100.0

VALID CASES      425       MISSING CASES       0
```

```
Household Survey

Q9N       Restaurant

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE   FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use                0        281       66.1       66.1        66.1

Use                       1        144       33.9       33.9       100.0
                               -------    -------    -------
                      TOTAL        425      100.0      100.0

VALID CASES      425       MISSING CASES       0
```

```
Household Survey

Q9O       Bank or Financial

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREC
CATEGORY LABEL         CODE   FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use                0        154       36.2       36.2        36.2

Use                       1        271       63.8       63.8       100.0
                               -------    -------    -------
                      TOTAL        425      100.0      100.0

VALID CASES      425       MISSING CASES       0
```

```
Household Survey

Q9P       Accountant or Tax

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE   FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Do NOT use                0        395       92.9       92.9        92.9

Use                       1         21        4.9        4.9        97.9

                          2          4        0.9        0.9        98.8

                          3          5        1.2        1.2       100.0
                               -------    -------    -------
                      TOTAL        425      100.0      100.0

VALID CASES      425       MISSING CASES       0
```

```
Household Survey

Q10       Visit more than one business?

                                        RELATIVE   ADJUSTED  CUMULATIVE
                            ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL       CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)
Yes                     1        129       30.4       31.7        31.7
No                      2         48       11.3       11.8        43.5
Sometimes               3        227       53.4       55.8       100.0
                        0         18        4.5    MISSING       100.0
                        8          2        0.5    MISSING       100.0
                             -------    -------    -------
                    TOTAL        425      100.0      100.0

VALID CASES     407       MISSING CASES     18
```

```
Household Survey

Q11A      Mode of transportation

                                        RELATIVE   ADJUSTED  CUMULATIVE
                            ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL       CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)
Car                     1        252       59.3       66.8        66.8
Taxi                    2          2        0.5        0.5        67.4
Bus or LRT              3         21        4.9        5.6        72.9
Walk                    4        102       24.0       27.1       100.0
                        0         48       11.3    MISSING       100.0
                             -------    -------    -------
                    TOTAL        425      100.0      100.0

VALID CASES     377       MISSING CASES     48
```

```
Household Survey

Q11B      Mode of transportation

                                        RELATIVE   ADJUSTED  CUMULATIVE
                            ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL       CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)
Car                     1         23        5.4       14.4        14.4
Taxi                    2          4        0.9        2.5        16.9
Bus or LRT              3         14        3.3        8.7        25.6
Walk                    4        118       27.8       73.7        99.4
Other                   5          1        0.2        0.6       100.0
                        0        264       62.1    MISSING       100.0
                        8          1        0.2    MISSING       100.0
                             -------    -------    -------
                    TOTAL        425      100.0      100.0

VALID CASES     160       MISSING CASES    265
```

```
Household Survey

Q12A      Last purchase-visit: Food < $5

                                         RELATIVE   ADJUSTED   CUMULATIVE
                            ABSOLUTE    FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL       CODE  FREQUENCY    (PERCENT)  (PERCENT)   (PERCENT)

Downtown                1        13         3.1        4.7         4.7

118 Ave                 2       148        34.8       53.6        58.3

Shopping Malls          3        21         4.9        7.6        65.9

Elsewhere               4        94        22.1       34.1       100.0

                        0       141        33.2     MISSING      100.0

Not sure No answer      5         5         1.2     MISSING      100.0

                        8         3         0.7     MISSING      100.0
                             -------     -------    -------
                    TOTAL       425       100.0      100.0

VALID CASES     276      MISSING CASES    149
```

```
Household Survey

Q12B      Last purchase-visit: Food > $5

                                         RELATIVE   ADJUSTED   CUMULATIVE
                            ABSOLUTE    FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL       CODE  FREQUENCY    (PERCENT)  (PERCENT)   (PERCENT)

Downtown                1         9         2.1        2.6         2.6

118 Ave                 2       231        54.4       66.6        69.2

Shopping Malls          3        43        10.1       12.4        81.6

Elsewhere               4        64        15.1       18.4       100.0

                        0        68        16.0     MISSING      100.0

Not sure No answer      5         1         0.2     MISSING      100.0

                        8         9         2.1     MISSING      100.0
                             -------     -------    -------
                    TOTAL       425       100.0      100.0

VALID CASES     347      MISSING CASES     78
```

```
Household Survey

Q12C      Last purchase-visit: Gas-Service Station

                                         RELATIVE   ADJUSTED   CUMULATIVE
                            ABSOLUTE    FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL       CODE  FREQUENCY    (PERCENT)  (PERCENT)   (PERCENT)

Downtown                1         8         1.9        2.9         2.9

118 Ave                 2       116        27.3       42.4        45.3

Shopping Malls          3        11         2.6        4.0        49.3

Elsewhere               4       141        33.2       50.7       100.0

                        0       128        30.1     MISSING      100.0

Not sure No answer      5        13         3.1     MISSING      100.0

                        8         6         1.4     MISSING      100.0
                             -------     -------    -------
                    TOTAL       425       100.0      100.0

VALID CASES     276      MISSING CASES    147
```

```
Household Survey

Q12D      Last purchase-visit: Vehicle repair

                                               RELATIVE   ADJUSTED   CUMULATIVE
                                    ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL               CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)
Downtown                        1          8        1.9        3.7         3.7
118 Ave                         2         41        9.6       19.2        22.9
Shopping Malls                  3         13        3.1        6.1        29.0
Elsewhere                       4        152       35.8       71.0       100.0
                                0        171       40.2    MISSING       100.0
Not sure No answer              8         39        9.2    MISSING       100.0
                                9          1        0.2    MISSING       100.0
                                     -------    -------    -------
                            TOTAL        425      100.0      100.0

VALID CASES      214       MISSING CASES    211
```

```
Household Survey

Q12E      Last purchase-visit: Bank or Financial

                                               RELATIVE   ADJUSTED   CUMULATIVE
                                    ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL               CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)
Downtown                        1         34        8.0       10.2        10.2
118 Ave                         2        187       44.0       56.2        66.4
Shopping Malls                  3         23        5.4        6.9        73.3
Elsewhere                       4         89       20.9       26.7       100.0
                                0         80       18.8    MISSING       100.0
                                9         12        2.8    MISSING       100.0
                                     -------    -------    -------
                            TOTAL        425      100.0      100.0

VALID CASES      333       MISSING CASES     92
```

```
Household Survey

Q12F      Last purchase-visit: Clothing

                                               RELATIVE   ADJUSTED   CUMULATIVE
                                    ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL               CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)
Downtown                        1         47       11.1       16.2        16.2
118 Ave                         2         14        3.3        4.8        21.0
Shopping Malls                  3        150       35.3       51.7        72.8
Elsewhere                       4         79       18.6       27.2       100.0
                                0        121       28.5    MISSING       100.0
Not sure No answer              8          5        1.2    MISSING       100.0
                                9          9        2.1    MISSING       100.0
                                     -------    -------    -------
                            TOTAL        425      100.0      100.0

VALID CASES      290       MISSING CASES    135
```

```
Household Survey

Q12G      Last purchase-visit: Hardware

                                          RELATIVE   ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Downtown                   1         13        3.1        4.9         4.9

118 Ave                    2         95       22.4       35.6        40.4

Shopping Malls             3         83       19.5       31.1        71.5

Elsewhere                  4         76       17.9       28.5       100.0

                           0        136       32.0    MISSING       100.0

Not sure No answer         5         13        3.1    MISSING       100.0

                           8          9        2.1    MISSING       100.0
                                -------    -------    -------
                       TOTAL        425      100.0      100.0

VALID CASES     267      MISSING CASES   158
```

```
Household Survey

Q12H      Last purchase-visit: Furniture-Appliance

                                          RELATIVE   ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Downtown                   1         23        5.4       10.2        10.2

Not indicated                        43       69.4    MISSING       100.0

118 Ave                    2         17        4.0        7.6        17.8

Shopping Malls             3         77       18.1       34.2        52.0

Elsewhere                  4        108       25.4       48.0       100.0

                           0        172       40.5    MISSING       100.0

Not sure No answer         5         25        5.9    MISSING       100.0

                           8          3        0.7    MISSING       100.0
                                -------    -------    -------
                       TOTAL        425      100.0      100.0

VALID CASES     225      MISSING CASES   200
```

```
Household Survey

Q12I      Last purchase-visit: Drugs-Cosmetics

                                          RELATIVE   ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Downtown                   1         20        4.7        6.2         6.2

118 Ave                    2        200       47.1       61.7        67.9

Shopping Malls             3         53       12.5       16.4        84.3

Elsewhere                  4         51       12.0       15.7       100.0

                           0         89       20.9    MISSING       100.0

Not sure No answer         5          3        0.7    MISSING       100.0

                           8          9        2.1    MISSING       100.0
                                -------    -------    -------
                       TOTAL        425      100.0      100.0

VALID CASES     324      MISSING CASES   101
```

```
Household Survey

012J       Last purchase-visit: Gov't Liquer Store

                                         RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)

Downtown                 1          7         1.6         2.6          2.6

118 Ave                  2        243        57.2        88.7         91.2

Shopping Malls           3         10         2.4         3.6         94.9

Elsewhere                4         14         3.3         5.1        100.0

                         0        125        29.4     MISSING        100.0

Not sure No answer       5         19         4.5     MISSING        100.0

            .            8          7         1.6     MISSING        100.0
                              -------     -------     -------
                     TOTAL        425       100.0       100.0

VALID CASES     274      MISSING CASES    151
```

```
Household Survey

012K       Last purchase-visit: Sporting Goods

                                         RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)

Downtown                 1         13         3.1         7.3          7.3

118 Ave                  2         24         5.6        13.6         20.9

Shopping Malls           3         57        13.4        32.2         53.1

Elsewhere                4         83        19.5        46.9        100.0

                         0        201        47.3     MISSING        100.0

Not sure No answer       5         44        10.4     MISSING        100.0

                         8          3         0.7     MISSING        100.0
                              -------     -------     -------
                     TOTAL        425       100.0       100.0

VALID CASES     177      MISSING CASES-   248
```

```
Household Survey

012L       Last purchase-visit  Barber-Beauty Shop

                                         RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)

Downtown                 1         28         6.6        10.5         10.5

118 Ave                  2        101        23.8        38.0         48.5

Shopping Malls           3         31         7.3        11.7         60.2

Elsewhere                4        106        24.9        39.8        100.0

                         0        140        32.9     MISSING        100.0

Not sure No answer       5         16         3.8     MISSING        100.0

                         8          3         0.7     MISSING        100.0
                              -------     -------     -------
                     TOTAL        425       100.0       100.0

VALID CASES     266      MISSING CASES    159
```

```
Household Survey

Q12M      Last purchase-visit: Dry cleaning

                                         RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)

Downtown                   1         10        2.4         3.8         3.8

118 Ave                    2        141       33.2        54.2        58.1

Shopping Malls             3         28        6.6        10.8        68.8

Elsewhere                  4         81       19.1        31.2       100.0

                           0        138       32.5     MISSING       100.0

Not sure No answer         5         26        6.1     MISSING       100.0

                           8          1        0.2     MISSING       100.0
                                -------    -------     -------
                       TOTAL        425      100.0       100.0

VALID CASES     260       MISSING CASES    165
```

```
Household Survey

Q12N      Last purchase-visit: Restaurant

                                         RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)

Downtown                   1         31        7.3        12.3        12.3

118 Ave                    2         79       18.6        31.3        43.7

Shopping Malls             3         31        7.3        12.3        56.0

Elsewhere                  4        111       26.1        44.0       100.0

                           0        146       34.4     MISSING       100.0

Not sure No answer         5         19        4.5     MISSING       100.0

                           8          8        1.9     MISSING       100.0
                                -------    -------     -------
                       TOTAL        425      100.0       100.0

VALID CASES     252       MISSING CASES    173
```

```
Household Survey

Q12O      Last purchase-visit: Accountant or Tax

                                         RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)

Downtown                   1         15        3.5        10.9        10.9

118 Ave                    2         19        4.5        13.8        24.6

Shopping Malls             3          9        2.1         6.5        31.2

Elsewhere                  4         95       22.4        68.8       100.0

                           0        195       45.9     MISSING       100.0

Not sure No answer         5         91       21.4     MISSING       100.0

                           8          1        0.2     MISSING       100.0
                                -------    -------     -------
                       TOTAL        425      100.0       100.0

VALID CASES     138       MISSING CASES    287
```

```
Household Survey

Q12P      Last purchase-visit: Real Estate Agent

                                          RELATIVE   ADJUSTED  CUMULATIVE
                              ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)
Downtown                   1         2        0.5        2.2         2.2
118 Ave                    2        12        2.8       13.2        15.4
Shopping Malls             3         4        0.9        4.4        19.8
Elsewhere                  4        73       17.2       80.2       100.0
                           0       207       48.7    MISSING       100.0
Not sure No answer         8       126       29.6    MISSING       100.0
                           9         1        0.2    MISSING       100.0
                                -------    -------    -------
                       TOTAL       425      100.0      100.0

VALID CASES      91      MISSING CASES    334
```

```
Household Survey

Q13A      Convenience-accessibility

                                          RELATIVE   ADJUSTED  CUMULATIVE
                              ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)
Very dissatisfied          1        28        6.6        7.6         7.6
Dissatisfied               2        41        9.6       11.1        18.7
Neutral                    3        47       11.1       12.7        31.4
Satisfied                  4       180       42.4       48.8        80.2
Very satisfied             5        73       17.2       19.8       100.0
                           0        49       11.5    MISSING       100.0
Don't know-Not sure        8         5        1.2    MISSING       100.0
                           9         2        0.5    MISSING       100.0
                                -------    -------    -------
                       TOTAL       425      100.0      100.0

VALID CASES     369      MISSING CASES     56
```

```
Household Survey

Q13B      Prices

                                          RELATIVE   ADJUSTED  CUMULATIVE
                              ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)
Very dissatisfied          1        11        2.6        3.1         3.1
Dissatisfied               2        32        7.5        9.0        12.0
Neutral                    3       125       29.4       35.0        47.1
Satisfied                  4       166       39.1       46.5        93.6
Very satisfied             5        23        5.4        6.4       100.0
                           0        49       11.5    MISSING       100.0
Don't know-Not sure        8        19        4.5    MISSING       100.0
                                -------    -------    -------
                       TOTAL       425      100.0      100.0

VALID CASES     357      MISSING CASES     68
```

```
Household Survey

Q13C      Selection of goods and services

                                          RELATIVE   ADJUSTED  CUMULATIVE
                              ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)
Very dissatisfied          1        15        3.5        4.5         4.5
Dissatisfied               2        49       11.5       14.5        19.0
Neutral                    3        96       22.6       28.5        47.5
Satisfied                  4       152       35.8       45.1        92.6
Very satisfied             5        25        5.9        7.4       100.0
                           0        76       17.9    MISSING       100.0
Don't know-Not sure        8        12        2.8    MISSING       100.0
                                -------    -------    -------
                       TOTAL       425      100.0      100.0

VALID CASES     337      MISSING CASES     88
```

```
Household Survey

Q13D      Parking

                                              RELATIVE    ADJUSTED   CUMULATIVE
                                  ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE    FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Very dissatisfied           1          59        13.9        18.2        18.2

Dissatisfied                2          81        19.1        24.9        43.1

Neutral                     3          65        15.3        20.0        63.1

Satisfied                   4          95        22.4        29.2        92.3

Very satisfied              5          25         5.9         7.7       100.0

                            0          81        19.1     MISSING       100.0

Don't know-Not sure         8          19         4.5     MISSING       100.0
                                  -------     -------     -------
                        TOTAL         425       100.0       100.0

VALID CASES     325      MISSING CASES    100
```

```
Household Survey

Q13E      Physical appearance

                                              RELATIVE    ADJUSTED   CUMULATIVE
                                  ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE    FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Very dissatisfied           1          63        14.8        17.7        17.7

Dissatisfied                2         105        24.7        29.6        47.3

Neutral                     3         102        24.0        28.7        76.1

Satisfied                   4          76        17.9        21.4        97.5

Very satisfied              5           9         2.1         2.5       100.0

                            0          61        14.4     MISSING       100.0

Don't know-Not sure         8           9         2.1     MISSING       100.0
                                  -------     -------     -------
                        TOTAL         425       100.0       100.0

VALID CASES     355      MISSING CASES     70
```

```
Household Survey

Q13F      Quality of service

                                              RELATIVE    ADJUSTED   CUMULATIVE
                                  ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE    FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Very dissatisfied           1           8         1.9         2.2         2.2

Dissatisfied                2          17         4.0         4.6         6.8

Neutral                     3          91        21.4        24.9        31.7

Satisfied                   4         206        48.5        56.3        88.0

Very satisfied              5          44        10.4        12.0       100.0

                            0          44        10.4     MISSING       100.0

Don't know-Not sure         8          14         3.3     MISSING       100.0

                            6           1         0.2     MISSING       100.0
                                  -------     -------     -------
                        TOTAL         425       100.0       100.0

VALID CASES     366      MISSING CASES     59
```

```
Household Survey

Q14A      Prices along 118 ave are competitive

                                          RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)
Strongly agree            1         24         5.6        6.9         6.9
Agree                     2        190        44.7       54.8        61.7
Neutral                   3         94        22.1       27.1        88.8
Disagree                  4         31         7.3        8.9        97.7
Strongly disagree         5          8         1.9        2.3       100.0
                          0         33         7.8    MISSING       100.0
Don't know                8         44        10.4    MISSING       100.0
                          9          1         0.2    MISSING       100.0
                               -------     -------    -------
                      TOTAL        425       100.0      100.0

VALID CASES     347      MISSING CASES    78
```

```
Household Survey

Q14B      High quality and personalised service

                                          RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)
Strongly agree            1         31         7.3        9.1         9.1
Agree                     2        138        32.5       40.5        49.6
Neutral                   3        126        29.6       37.0        86.5
Disagree                  4         43        10.1       12.6        99.1
Strongly disagree         5          3         0.7        0.9       100.0
                          0         48        11.3    MISSING       100.0
Don't know                8         35         8.2    MISSING       100.0
                          9          1         0.2    MISSING       100.0
                               -------     -------    -------
                      TOTAL        425       100.0      100.0

VALID CASES     341      MISSING CASES    84
```

```
Household Survey

Q14C      Convenient to shop on 118 ave

                                          RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)
Strongly agree            1         88        20.7       22.6        22.6
Agree                     2        190        44.7       48.7        71.3
Neutral                   3         53        12.5       13.6        84.9
Disagree                  4         47        11.1       12.1        96.9
Strongly disagree         5         12         2.8        3.1       100.0
                          0         32         7.5    MISSING       100.0
Don't know                8          3         0.7    MISSING       100.0
                               -------     -------    -------
                      TOTAL        425       100.0      100.0

VALID CASES     390      MISSING CASES    35
```

```
Household Survey

Q14D      Nice atmosphere&physical appearance

                                         RELATIVE   ADJUSTED  CUMULATIVE
                             ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Strongly agree           1         18         4.2        4.9         4.9

Agree                    2         60        14.1       16.2        21.0

Neutral                  3        118        27.8       31.8        52.8

Disagree                 4        119        28.0       32.1        84.9

Strongly disagree        5         56        13.2       15.1       100.0

                         0         45        10.6    MISSING       100.0

Don't know               8          7         1.6    MISSING       100.0

                         9          2         0.5    MISSING       100.0
                              -------     -------    -------
                     TOTAL        425       100.0      100.0

VALID CASES     371      MISSING CASES     54
```

```
Household Survey

Q14E      Businesses are readily accessible

                                         RELATIVE   ADJUSTED  CUMULATIVE
                             ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Strongly agree           1         66        15.5       17.0        17.0

Agree                    2        198        46.6       50.9        67.9

Neutral                  3         55        12.9       14.1        82.0

Disagree                 4         48        11.3       12.3        94.3

Strongly disagree        5         22         5.2        5.7       100.0

                         0         34         8.0    MISSING       100.0

Don't know               8          2         0.5    MISSING       100.0
                              -------     -------    -------
                     TOTAL        425       100.0      100.0

VALID CASES     389      MISSING CASES     36
```

```
Household Survey

Q14F      Good selection of goods and services

                                         RELATIVE   ADJUSTED  CUMULATIVE
                             ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Strongly agree           1         24         5.6        6.5         6.5

Agree                    2        141        33.2       38.2        44.7

Neutral                  3         96        22.6       26.0        70.7

Disagree                 4         86        20.2       23.3        94.0

Strongly disagree        5         22         5.2        6.0       100.0

                         0         38         8.9    MISSING       100.0

Don't know               8         17         4.0    MISSING       100.0

                         9          1         0.2    MISSING       100.0
                              -------     -------    -------
                     TOTAL        425       100.0      100.0

VALID CASES     369      MISSING CASES     56
```

8.3 SHOPPING SURVEY

8.3.1 Description

During a three-day period extending from December 9 to 11, 1982, shoppers along 118th Avenue were interviewed. The interviewers (four the first day, and three on each of the following two days) attempted to survey shoppers at various points along the Avenue between 82 Street and 97 Street. A series of ten questions were asked of shoppers who agreed to participate in the survey, and an additional five questions were completed by the interviewer. A copy of the survey form is attached on the following page.

A total of 450 survey forms were completed and provided the input for the computer data entries and tabulations.

118 AVENUE SHOPPING SURVEY

Hello, I'm assisting the City of Edmonton and the East Edmonton Business Association with a shopping survey. May I ask you a few questions? – it will take only three or four minutes. (If no, thank the respondent and proceed to another interview.)

Are you doing any shopping or visiting any of the businesses nearby today? (If no, terminate interview with thanks.)

OFFICE USE ONLY

How many different shops or businesses in this area do you expect to visit on this trip?

1. How many different shops or businesses in this area do you expect to visit on this trip?
☐ 1 ☐ 2 ☐ 3 ☐ 4 or more
1

2. How did you travel here today?
Car ☐ 1 Taxi ☐ 2 Bus/LRT ☐ 3 Walk ☐ 4 Other ☐ 5
2

3. Could you tell me approximately how far you live from 118th Avenue?
One or two blocks away ☐ 1 Three or four blocks away ☐ 2 Five or six blocks away ☐ 3
½ mile - 1 mile away ☐ 4 1 - 3 miles away ☐ 5 More than 3 miles away ☐ 6
3

4. How often do you shop at or visit any of the businesses along 118th Avenue?
Almost every day ☐ 1 Once or twice a week ☐ 2 Once or twice a month ☐ 3
Seldom or infrequently ☐ 4 Never ☐ 5
4

5. Could you tell me where you made your most recent purchase or visit for the following?

	Downtown	118th Avenue	One of the major shopping malls or centres	Elsewhere	Not Sure/ No answer	OFFICE USE ONLY
Food (less than $5)	1	2	3	4	5	5
Food (more than $5)	1	2	3	4	5	6
Gasoline Service Station	1	2	3	4	5	7
Motor Vehicle Repair	1	2	3	4	5	8
Bank or Financial Institution	1	2	3	4	5	9
Clothing	1	2	3	4	5	10
Hardware	1	2	3	4	5	11
Furniture/Appliances	1	2	3	4	5	12
Drugs/Cosmetics	1	2	3	4	5	13
Gov't. Liquor Store	1	2	3	4	5	14
Sporting Goods	1	2	3	4	5	15
Barber/Beauty Shop	1	2	3	4	5	16
Restaurant	1	2	3	4	5	17
Accountant or Tax Consultant	1	2	3	4	5	18
Real Estate Agent	1	2	3	4	5	19

6. Could you tell me the main reasons why you come here or shop in this area (along 118th Avenue)?
Convenience/Accessibility/Close to home ☐ 1 Good selection of businesses or services ☐ 2
Nice atmosphere ☐ 3 Friendly service ☐ 4
Other (please specify) ______________________ ☐ 5
____
20-22

7. What thing(s) about shopping in this area don't you like?
Traffic congestion ☐ 1 Parking situation ☐ 2
Physical appearance ☐ 3 Scattered businesses ☐ 4
Prices ☐ 5 Quality of service provided ☐ 6
Other (please specify) ______________________ ☐ 7
____
23-25

8. What kinds of improvements or changes would attract you to 118th Avenue more often?
Better parking ☐ 1 Road improvements (reduced congestion) ☐ 2
General physical improvement to the area/ beautification ☐ 3 Sidewalk/street cleaning ☐ 4
New businesses (specify) ______________________ ☐ 5
Other (please specify) ______________________ ☐ 6
26-28

Now, I'd like to ask you two more questions to help us classify your answers.

9. How many people, including yourself, are in your household? ______________ 29

10. Are you:
Employed full-time outside the home? ☐ 1 Employed part-time outside the home? ☐ 2
Unemployed? ☐ 3 A student? ☐ 4 30
A housewife? ☐ 5 Retired? ☐ 6
Other? ☐ 7

Thank-you very much for your cooperation and assistance.

[Interviewer: Don't forget to complete the remainder of the questionnaire after you have terminated the interview.]

11. Do not ask, but code the age category of the respondent.
0-19 ☐ 1 20-34 ☐ 2 35-49 ☐ 3 50-64 ☐ 4 65+ ☐ 5 31

12. Respondent's sex?
Female ☐ 1 Male ☐ 2 32

13. Place of interview? ______________________________ 33

14. Time of interview?
Prior to 11:30 a.m. ☐ 1 11:30-1:29 pm ☐ 2 1:30-3:59 pm ☐ 3 4:00-5:59 pm ☐ 4 6:00 or later ☐ 5 34

15. Day of interview?
Monday ☐ 1 Tuesday ☐ 2 Wednesday ☐ 3 Thursday ☐ 4 Friday ☐ 5 Saturday ☐ 6 35

16. Initials of interviewer ______________

8.3.2 Findings

A brief summary of the responses to the shopper surveys is provided below. The detailed computer tabulations are presented in Section 8.3.3.

Question 1. How many different shops or businesses in this area do you expect to visit on this trip?

Slightly more than one-half (51.5%) of the shoppers expected to visit only one business, one-quarter (24%) expected to visit two businesses, and the remainder intended to visit three or more establishments. These results suggest that there is a limited amount of browsing and multi-business shopping. The findings are not significantly different if shoppers visiting the Safeway's and liquor store are excluded from the analysis.

Question 2. How did you travel here today?

Responses:

Car	69%
Taxi	1%
Bus or LRT	7%
Walk	21%
Other	2%
TOTAL	100%

The automobile is the dominant form of transport for shoppers and its significance brings into focus the concerns regarding traffic congestion and parking, which are discussed later. It is interesting to observe that even for those shoppers living within four blocks of the Avenue, 52% were travelling by automobile.

Question 3. How far do you live from 118th Avenue?

DISTANCE FROM 118TH AVENUE	% OF SHOPPERS
1 - 2 Blocks	29
3 - 4 Blocks	14
5 - 6 Blocks	13
Half to One Mile	9
1 - 3 Miles	9
More Than 3 Miles	25
TOTAL	99%*

* due to rounding

Although, as expected, a majority of shoppers are from the immediate neighborhoods, a surprisingly large number of shoppers live a considerable distance from 118th Avenue.

Question 4. How often do you shop at or visit any of the businesses along 118th Avenue?

Seventy-five percent of shoppers visit the business area at least once per week and 85%, at least monthly. Although people who live farther away tend to shop along 118th Avenue less frequently, 45% of those shoppers living more than one mile away visit the area at least once per week.

These figures suggest that the shopper patterns and loyalty pertaining to the commercial strip are fairly strongly established.

Question 5. Were did you make your most recent purchase or visit for the following items?

	% OF RESPONDENTS INDICATING 118 AVENUE		
	All Shoppers	Shoppers Living Within 6 Blocks	Shoppers Living More Than 6 Blocks Away
Food (less than $5)	61	77	39
Food (more than $5)	71	90	42
Gasoline Service Station	44	58	30
Motor Vehicle Repair	16	19	13
Bank or Financial Institution	56	65	43
Clothing	4	5	1
Hardware	39	46	30
Furniture/Appliances	9	11	7
Drug/Cosmetics	59	79	32
Government Liquor Store	74	90	55
Sporting Goods	19	22	16
Barber/Beauty Shop	38	51	23
Restaurant	44	45	43

The results indicate that a majority of shoppers rely on the 118th Avenue area for purchases of food, drug, and liquor purchases, and financial services. The figures appear also to confirm the unavailability of higher-order shopping facilities in the study area, and the concentration of low-order, convenience-type services.

Question 6. What are the main reasons why you shop in this area?

Approximately 80% of respondents indicated convenience and accessibility as the main reasons for shopping along 118th Avenue. That percentage increases for shoppers who live in the immediate neighorhoods. A further 6% of respondents were attracted to a specific store or business.

The dominant importance of the convenience factor suggests the need to reinforce and to safeguard that asset, and the limited reference to other factors suggests opportunities for various enhancement measures.

Question 7. What things about shopping in this area don't you like?

FACTOR	% OF RESPONDENTS
Traffic Congestion	39
Parking Situation	27
Physical Appearance	18
Scattered Businesses	6
Prices	4
Quality of Service	3
Poor Selection	6
Crime/Loiterers	6
One-Way Streets	4

In declining order of significance, traffic congestion, parking considerations, and the physical appearance of the business area are the major problem areas identified.

Prices, quality of service, and the physical distribution of businesses are not cited as major problem areas, although the latter may be related to the high incidence of automobile usage and the lack of "browsing-type" shopping.

Question 8. What kinds of improvements or changes would attract you to 118th Avenue more often?

IMPROVEMENT OR CHANGE	% OF RESPONDENTS
Better Parking	27
Road Improvements	39
Beautification	27
Road Cleaning	9
New Businesses	23

In declining order of importance, road improvements, better parking, beautification, and new businesses were cited by shoppers as priority areas of improvement to the study area. The most frequently-cited new businesses included clothing stores.

Question 9. How many persons are in you household?

The average household size is 3.0.

Questions 10 to 12 relate to the demographic characteristics of the shoppers, and the responses have been compared to similar information obtained in the household survey.

In general, the 'shopper' population is characterized by having a greater proportion of persons in the labour force, students, and housewives, and a smaller proportion of retired persons. The average age of shoppers is significantly below that for adults in the community. Males comprise slightly more than 60% of shoppers compared to 50% of household respondents.

Question 13. What is the interview location?

Although interviews were conducted at various locations along 118th Avenue, 46% were located in the 89 Street to 90 Street area, which includes Safeway's and the A.L.C.B. outlet. Another 34% of interviews were distributed along the ten-block area to the east, and the remaining 20% in the western part of the business district between 91 Street and 97 Street.

8.3.3 Survey Tabulations

The computerized tabulations of the shopper surveys are included on the following pages.

```
Shopper Interviews

Q1        # of businesses visited on this trip

                                         RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

One                        1       227       50.4        51.5         51.5

Two                        2       107       23.8        24.3         75.7

Three                      3        47       10.4        10.7         86.4

Four or more               4        60       13.3        13.6        100.0

                           8         2        0.4     MISSING        100.0

                           9         7        1.6     MISSING        100.0
                                 -------    -------     -------
                       TOTAL       450      100.0       100.0

VALID CASES      441       MISSING CASES      9
```

```
Shopper Interviews

Q2        Type of transportation

                                         RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Car                        1       310       68.9        69.4         69.4

Taxi                       2         4        0.9         0.9         70.2

Bus or LRT                 3        32        7.1         7.2         77.4

Walk                       4        94       20.9        21.0         98.4

Other                      5         7        1.6         1.6        100.0

                           8         1        0.2     MISSING        100.0

                           9         2        0.4     MISSING        100.0
                                 -------    -------     -------
                       TOTAL       450      100.0       100.0

VALID CASES      447       MISSING CASES      3
```

```
Shopper Interviews

Q3        Distance from 118 Ave

                                         RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

1-2 Blocks                 1       130       28.9        29.3         29.3

3-4 Blocks                 2        63       14.0        14.2         43.6

5-6 Blocks                 3        59       13.1        13.3         56.9

Half-1 Mile                4        40        8.9         9.0         65.9

1-3 Miles                  5        39        8.7         8.8         74.7

>3 Miles                   6       112       24.9        25.3        100.0

                           8         2        0.4     MISSING        100.0

                           9         5        1.1     MISSING        100.0
                                 -------    -------     -------
                       TOTAL       450      100.0       100.0

VALID CASES      443       MISSING CASES      7
```

```
Shopper Interviews

Q4        Frequency of visits to 118Ave businesses

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Daily                      1        118       26.2       27.1        27.1

Weekly                     2        197       43.8       45.2        72.2

 Monthly                   3         56       12.4       12.8        85.1

Infrequently               4         59       13.1       13.5        98.6

Never                      5          6        1.3        1.4       100.0

                           8          1        0.2    MISSING       100.0

                           9         13        2.9    MISSING       100.0
                                  -------    -------    -------
                       TOTAL        450      100.0      100.0

VALID CASES     436      MISSING CASES    14
```

```
Shopper Interviews

Q5A       Last purchase-visit: Food < $5

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Downtown                   1          6        1.3        1.9         1.9

118 Ave                    2        192       42.7       61.1        63.1

Shopping Malls             3         27        6.0        8.6        71.7

Elsewhere                  4         89       19.8       28.3       100.0

Not sure No answer         5         50       11.1    MISSING       100.0

                           8          3        0.7    MISSING       100.0

                           9         83       18.4    MISSING       100.0
                                  -------    -------    -------
                       TOTAL        450      100.0      100.0

VALID CASES     314      MISSING CASES    136
```

```
Shopper Interviews

Q5B       Last purchase-visit: Food > $5

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Downtown                   1          4        0.9        1.0         1.0

118 Ave                    2        278       61.8       70.6        71.6

Shopping Malls             3         38        8.4        9.6        81.2

Elsewhere                  4         74       16.4       18.8       100.0

Not sure No answer         5          7        1.6    MISSING       100.0

                           8         17        3.8    MISSING       100.0

                           9         32        7.1    MISSING       100.0
                                  -------    -------    -------
                       TOTAL        450      100.0      100.0

VALID CASES     394      MISSING CASES    56
```

```
Shopper Interviews

OSC       Last purchase-visit: Gas-Service Station

                                                RELATIVE    ADJUSTED   CUMULATIVE
                                   ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL             CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)
Downtown                      1          7         1.6         2.3         2.3
118 Ave                       2        135        30.0        44.3        46.6
Shopping Malls                3         19         4.2         6.2        52.8
Elsewhere                     4        144        32.0        47.2       100.0
Not sure No answer            5         88        19.6     MISSING       100.0
                              8         11         2.4     MISSING       100.0
                              9         46        10.2     MISSING       100.0
                                   -------     -------     -------
                          TOTAL        450       100.0       100.0

VALID CASES      305       MISSING CASES    145
```

```
Shopper Interviews

OSD       Lasr purchase-visit: Motor vehicle repai

                                                RELATIVE    ADJUSTED   CUMULATIVE
                                   ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL             CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)
Downtown                      1         13         2.9         7.4         7.4
118 Ave                       2         28         6.2        15.9        23.3
Shopping Malls                3          8         1.8         4.5        27.8
Elsewhere                     4        127        28.2        72.2       100.0
Not sure No answer            5        189        42.0     MISSING       100.0
                              8          1         0.2     MISSING       100.0
                              9         84        18.7     MISSING       100.0
                                   -------     -------     -------
                          TOTAL        450       100.0       100.0

VALID CASES      176       MISSING CASES    274
```

```
Shopper Interviews

OSE       Last purchase-visit  Bank or Financial

                                                RELATIVE    ADJUSTED   CUMULATIVE
                                   ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL             CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)
Downtown                      1         45        10.0        11.0        11.0
118 Ave                       2        227        50.4        55.6        66.7
Shopping Malls                3         18         4.0         4.4        71.1
Elsewhere                     4        118        26.2        28.9       100.0
Not sure No answer            5         10         2.2     MISSING       100.0
                              8          6         1.3     MISSING       100.0
                              9         26         5.8     MISSING       100.0
                                   -------     -------     -------
                          TOTAL        450       100.0       100.0

VALID CASES      408       MISSING CASES     42
```

```
Shopper Interviews

OSF       Last purchase-visit: Clothing

                                                RELATIVE    ADJUSTED   CUMULATIVE
                                   ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL             CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)
Downtown                      1         75        16.7        20.5        20.5
118 Ave                       2         13         2.9         3.6        24.1
Shopping Malls                3        197        43.8        54.0        78.1
Elsewhere                     4         80        17.8        21.9       100.0
Not sure No answer            5         16         3.6     MISSING       100.0
                              8         18         4.0     MISSING       100.0
                              9         51        11.3     MISSING       100.0
                                   -------     -------     -------
                          TOTAL        450       100.0       100.0

VALID CASES      365       MISSING CASES     85
```

```
Shopper Interviews

Q5G      Last purchase-visit: Hardware

                                           RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL            CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Downtown                     1        19        4.2         6.6          6.6

118 Ave                      2       111       24.7        38.7         45.3

Shopping Malls               3        53       11.8        18.5         63.8

Elsewhere                    4       104       23.1        36.2        100.0

Not sure No answer           5        90       20.0     MISSING        100.0

                             8         8        1.8     MISSING        100.0

                             9        65       14.4     MISSING        100.0
                                 -------    -------     -------
                         TOTAL       450      100.0       100.0

VALID CASES     287      MISSING CASES    163
```

```
Shopper Interviews

Q5H      Last purchase-visit: Furniture-Appliance

                                           RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL            CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Downtown                     1        47       10.4        21.8         21.8

118 Ave                      2        19        4.2         8.8         30.6

Shopping Malls               3        51       11.3        23.6         54.2

Elsewhere                    4        99       22.0        45.8        100.0

Not sure No answer           5       139       30.9     MISSING        100.0

                             8         3        0.7     MISSING        100.0

                             9        92       20.4     MISSING        100.0
                                 -------    -------     -------
                         TOTAL       450      100.0       100.0

VALID CASES     216      MISSING CASES    234
```

```
Shopper Interviews

Q5I      Last purchase-visit: Drugs-Cosmetics

                                           RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL            CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Downtown                     1        16        3.6         4.7          4.7

118 Ave                      2       203       45.1        59.4         64.0

Shopping Malls               3        43        9.6        12.6         76.6

Elsewhere                    4        80       17.8        23.4        100.0

Not sure No answer           5        37        8.2     MISSING        100.0

                             8         5        1.1     MISSING        100.0

                             9        66       14.7     MISSING        100.0
                                 -------    -------     -------
                         TOTAL       450      100.0       100.0

VALID CASES     342      MISSING CASES    108
```

```
Shopper Interviews

05M       Last purchase-visit: Restaurant

                                             RELATIVE    ADJUSTED  CUMULATIVE
                                 ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE    FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)
Downtown                   1          62       13.8        19.1        19.1
118 Ave                    2         143       31.8        44.1        63.3
Shopping Malls             3          26        5.8         8.0        71.3
Elsewhere                  4          93       20.7        28.7       100.0
Not sure No answer         5          67       14.9     MISSING       100.0
                           8          17        3.8     MISSING       100.0
                           9          42        9.3     MISSING       100.0
                                 -------     -------     -------
                       TOTAL         450      100.0       100.0

VALID CASES     324      MISSING CASES    126
```

```
Shopper Interviews

05N       Last purchase-visit  Accountant or Tax

                                             RELATIVE    ADJUSTED  CUMULATIVE
                                 ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE    FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)
Downtown                   1          14        3.1        14.6        14.6
118 Ave                    2          20        4.4        20.8        35.4
Shopping Malls             3           8        1.8         8.3        43.8
Elsewhere                  4          54       12.0        56.3       100.0
Not sure No answer         5         257       57.1     MISSING       100.0
                           8           1        0.2     MISSING       100.0
                           9          96       21.3     MISSING       100.0
                                 -------     -------     -------
                       TOTAL         450      100.0       100.0

VALID CASES      96      MISSING CASES    354
```

```
Shopper Interviews

05O       Last purchase-visit  Real Estate Agent

                                             RELATIVE    ADJUSTED  CUMULATIVE
                                 ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE    FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)
Downtown                   1           6        1.3        12.8        12.8
118 Ave                    2           5        1.1        10.6        23.4
Shopping Malls             3           1        0.2         2.1        25.5
Elsewhere                  4          35        7.8        74.5       100.0
Not sure No answer         5         299       66.4     MISSING       100.0
                           9         104       23.1     MISSING       100.0
                                 -------     -------     -------
                       TOTAL         450      100.0       100.0

VALID CASES      47      MISSING CASES    403
```

```
Shopper Interviews

Q5J       Last purchase-visit  Gov't Liquor Store

                                             RELATIVE    ADJUSTED   CUMULATIVE
                                 ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Downtown                    1          6         1.3         1.8         1.8

118 Ave                     2        249        55.3        74.1        75.9

Shopping Malls              3         26         5.8         7.7        83.6

Elsewhere                   4         55        12.2        16.4       100.0

Not sure No answer          5         68        15.1     MISSING       100.0

                            8          7         1.6     MISSING       100.0

                            9         39         8.7     MISSING       100.0
                                 -------     -------     -------
                        TOTAL        450       100.0       100.0

VALID CASES      336      MISSING CASES    114
```

```
Shopper Interviews

Q5K       Last purchase-visit  Sporting Goods

                                             RELATIVE    ADJUSTED   CUMULATIVE
                                 ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Downtown                    1         18         4.0         8.7         8.7

118 Ave                     2         40         8.9        19.3        28.0

Shopping Malls              3         57        12.7        27.5        55.6

Elsewhere                   4         92        20.4        44.4       100.0

Not sure No answer          5        146        32.4     MISSING       100.0

                            8          5         1.1     MISSING       100.0

                            9         92        20.4     MISSING       100.0
                                 -------     -------     -------
                        TOTAL        450       100.0       100.0

VALID CASES      207      MISSING CASES    243
```

```
Shopper Interviews

Q5L       Last purchase-visit  Barber-Beauty Shop

                                             RELATIVE    ADJUSTED   CUMULATIVE
                                 ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Downtown                    1         53        11.8        16.4        16.4

118 Ave                     2        122        27.1        37.8        54.2

Shopping Malls              3         41         9.1        12.7        66.9

Elsewhere                   4        107        23.8        33.1       100.0

Not sure No answer          5         59        13.1     MISSING       100.0

                            8          5         1.1     MISSING       100.0

                            9         63        14.0     MISSING       100.0
                                 -------     -------     -------
                        TOTAL        450       100.0       100.0

VALID CASES      323      MISSING CASES    127
```

```
Shopper Interviews

Q6A        Main reasons for shopping on 118 Ave

                                        RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Convenience               1       367       81.6       83.2        83.2

Good Selection            2        11        2.4        2.5        85.7

Nice Atmosphere           3         3        0.7        0.7        86.4

Friendly Service          4         6        1.3        1.4        87.8

Other                     5        54       12.0       12.2       100.0

                          0         1        0.2    MISSING       100.0

                          9         8        1.8    MISSING       100.0
                                -------    -------    -------
                      TOTAL       450      100.0      100.0

VALID CASES     441      MISSING CASES      9
```

```
Shopper Interviews

Q6B        Main reasons for shopping on 118 Ave

                                        RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Good Selection            2         6        1.3       20.7        20.7

Nice Atmosphere           3         2        0.4        6.9        27.6

Friendly Service          4        11        2.4       37.9        65.5

Other                     5        10        2.2       34.5       100.0

                          0       421       93.6    MISSING       100.0
                                -------    -------    -------
                      TOTAL       450      100.0      100.0

VALID CASES      29      MISSING CASES    421
```

```
Shopper Interviews

Q6C        Main reasons for shopping on 118 Ave

                                        RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Friendly Service          4         1        0.2      100.0       100.0

                          0       449       99.8    MISSING       100.0
                                -------    -------    -------
                      TOTAL       450      100.0      100.0

VALID CASES       1      MISSING CASES    449
```

```
Shopper Interviews

07A       Drawbacks to shopping on 118 Ave

                                                RELATIVE   ADJUSTED  CUMULATIVE
                                    ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL             CODE    FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Traffic Congestion            1          134        29.8       39.1        39.1

Parking Situation             2           42         9.3       12.2        51.3

Physical Appearance           3           39         8.7       11.4        62.7

Scattered Businesses          4           15         3.3        4.4        67.1

Pric                          5           11         2.4        3.2        70.3

Quality of Service            6            6         1.3        1.7        72.0

Other                         7           96        21.3       28.0       100.0

                              9          107        23.8    MISSING       100.0
                                     -------     -------    -------
                          TOTAL          450       100.0      100.0

VALID CASES      343      MISSING CASES    107
```

```
Shopper Interviews

07B       Drawbacks to shopping on 118 Ave

                                                RELATIVE   ADJUSTED  CUMULATIVE
                                    ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL             CODE    FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Parking Situation             2           50        11.1       48.5        48.5

Physical Appearance           3           16         3.6       15.5        64.1

Scattered Businesses          4            5         1.1        4.9        68.9

Pric                          5            1         0.2        1.0        69.9

Quality of Service            6            2         0.4        1.9        71.8

Other                         7           29         6.4       28.2       100.0

                              0          347        77.1    MISSING       100.0
                                     -------     -------    -------
                          TOTAL          450       100.0      100.0

VALID CASES      103      MISSING CASES    347
```

```
Shopper Interviews

07C       Drawbacks to shopping on 118 Ave

                                                RELATIVE   ADJUSTED  CUMULATIVE
                                    ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL             CODE    FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Physical Appearance           3            8         1.8       38.1        38.1

Scattered Businesses          4            1         0.2        4.8        42.9

Pric                          5            1         0.2        4.8        47.6

Quality of Service            6            1         0.2        4.8        52.4

Other                         7           10         2.2       47.6       100.0

                              0          429        95.3    MISSING       100.0
                                     -------     -------    -------
                          TOTAL          450       100.0      100.0

VALID CASES       21      MISSING CASES    429
```

```
Shopper Interviews

Q8A        Improvements that would attract shopper

                                             RELATIVE    ADJUSTED    CUMULATIVE
                                 ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)

Better Parking              1         93        20.7        25.5         25.5
Road Improvements           2         71        15.8        19.5         44.9
Beautificati                3         70        15.6        19.2         64.1
Road Cleaning               4         11         2.4         3.0         67.1
New Businesses              5         27         6.0         7.4         74.5
Other                       6         93        20.7        25.5        100.0
                            9         85        18.9     MISSING        100.0
                                 --------    --------    --------
                        TOTAL        450       100.0       100.0

VALID CASES      365       MISSING CASES     85
```

```
Shopper Interviews

Q8B        Improvements that would attract shopper

                                             RELATIVE    ADJUSTED    CUMULATIVE
                                 ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)

Road Improvements           2         43         9.6        35.8         35.8
Beautificati                3         20         4.4        16.7         52.5
Road Cleaning               4         19         4.2        15.8         68.3
New Businesses              5         12         2.7        10.0         78.3
Other                       6         26         5.8        21.7        100.0
                            0        330        73.3     MISSING        100.0
                                 --------    --------    --------
                        TOTAL        450       100.0       100.0

VALID CASES      120       MISSING CASES    330
```

```
Shopper Interviews

Q8C        Improvements that would attract shopper

                                             RELATIVE    ADJUSTED    CUMULATIVE
                                 ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)

Beautificati                3          3         0.7        12.0         12.0
Road Cleaning               4          3         0.7        12.0         24.0
New Businesses              5          8         1.8        32.0         56.0
Other                       6         11         2.4        44.0        100.0
                            0        425        94.4     MISSING        100.0
                                 --------    --------    --------
                        TOTAL        450       100.0       100.0

VALID CASES       25       MISSING CASES    425
```

CODE =

Persons in
Household

```
Shopper Interviews

09        # of people in household

                                              RELATIVE    ADJUSTED   CUMULATIVE
                                  ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL           CODE    FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)

                            1          57        12.7        12.9         12.9

                            2         148        32.9        33.5         46.4

                            3          91        20.2        20.6         67.0

                            4          76        16.9        17.2         84.2

                            5          46        10.2        10.4         94.6

                            6          15         3.3         3.4         98.0

                            7           9         2.0         2.0        100.0

                            8           5         1.1     MISSING        100.0

                            9           3         0.7     MISSING        100.0
                                  -------     -------     -------
                        TOTAL         450       100.0       100.0

VALID CASES      442      MISSING CASES      8
```

```
Shopper Interviews

010       Employment status

                                              RELATIVE    ADJUSTED   CUMULATIVE
                                  ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL           CODE    FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)

Full-time                   1         250        55.6        56.3         56.3

Part-time                   2          15         3.3         3.4         59.7

Unemployed                  3          61        13.6        13.7         73.4

Student                     4          20         4.4         4.5         77.9

Housewife                   5          47        10.4        10.6         88.5

Retired                     6          45        10.0        10.1         98.6

Other                       7           6         1.3         1.4        100.0

                            8           4         0.9     MISSING        100.0

                            9           2         0.4     MISSING        100.0
                                  -------     -------     -------
                        TOTAL         450       100.0       100.0

VALID CASES      444      MISSING CASES      6
```

```
Shopper Interviews

011       Age

                                              RELATIVE    ADJUSTED   CUMULATIVE
                                  ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL           CODE    FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)

0-19                        1          17         3.8         3.9          3.9

20-34                       2         225        50.0        51.5         55.4

35-49                       3         109        24.2        24.9         80.3

50-64                       4          46        10.2        10.5         90.8

65+                         5          40         8.9         9.2        100.0

                            9          13         2.9     MISSING        100.0
                                  -------     -------     -------
                        TOTAL         450       100.0       100.0

VALID CASES      437      MISSING CASES     13
```

```
Shopper Interviews

012      Sex

                                             RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE    FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE   FREQUENCY    (PERCENT)   (PERCENT)    (PERCENT)

Female                     1         170         37.8        38.7         38.7

Male                       2         269         59.8        61.3        100.0

                           9          11          2.4     MISSING        100.0
                                 -------      -------     -------
                       TOTAL         450        100.0       100.0

VALID CASES      439       MISSING CASES      11
```

LOCATION CODE =

Nearest Street Intersection

```
Shopper Interviews

013      Location of interview

                                             RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE    FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE   FREQUENCY    (PERCENT)   (PERCENT)    (PERCENT)

                          32           1          0.2         0.2          0.2

                          79          15          3.3         3.3          3.6

                          80          12          2.7         2.7          6.2

                          81           9          2.0         2.0          8.2

                          82          31          6.9         6.9         15.1

                          83          10          2.2         2.2         17.3

                          84           3          0.7         0.7         18.0

                          85          33          7.3         7.3         25.3

                          86           5          1.1         1.1         26.4

                          87           3          0.7         0.7         27.1

                          88          31          6.9         6.9         34.0

                          89         156         34.7        34.7         68.7

                          90          51         11.3        11.3         80.0

                          91          19          4.2         4.2         84.2

                          92          23          5.1         5.1         89.3

                          93          11          2.4         2.4         91.8

                          94          16          3.6         3.6         95.3

                          95          16          3.6         3.6         98.9

                          96           2          0.4         0.4         99.3

                          97           2          0.4         0.4         99.8

                          99           1          0.2         0.2        100.0
                                 -------      -------     -------
                       TOTAL         450        100.0       100.0
```

```
Shopper Interviews

014       Time of interview

                                          RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

<11:30                   1        108        24.0       24.3        24.3

11:30 - 1:29             2        117        26.0       26.3        50.6

1:30 - 3:59              3        128        28.4       28.8        79.3

4:00 - 5:59              4         92        20.4       20.7       100.0

                         9          5         1.1    MISSING       100.0
                              -------     -------    -------
                     TOTAL        450       100.0      100.0

VALID CASES     445       MISSING CASES     5
```

```
Shopper Interviews

015       Day of interview

                                          RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Thurs                    4        143        31.8       32.1        32.1

Fri                      5        130        28.9       29.2        61.3

Sat                      6        172        38.2       38.7       100.0

                         9          5         1.1    MISSING       100.0
                              -------     -------    -------
                     TOTAL        450       100.0      100.0

VALID CASES     445       MISSING CASES     5
```

8.4 BUSINESS SURVEY

8.4.1 Description

A survey of business establishments along 118th Avenue was carried out concurrently with the household and shopper surveys. Questionnaires were hand-delivered to the operators of all retail and service businesses in the study area by representatives of the East Edmonton Business Association. Follow-up visits to the businesses were made to collect the completed survey forms.

Of the approximately 170 commercial and non-commercial establishments in the study area, completed survey responses were obtained from 62 businesses. That response rate is considered satisfactory, recognizing the following factors:

- the survey was carried out during the hectic, pre-Christmas, retail activity period,
- a number of local merchants have an ethnic background and may have had problems interpreting the survey form.
- the branch offices of national firms (for example, supermarkets, the banks, chain restaurants, etc.) are generally reluctant to complete such survey forms and, indeed, to commit themselves to participation in a Business Improvement Program.
- the development of the 118th Avenue Business Improvement Program is still at an embryonic stage, and a number of business operators are

undoubtedly unaware of the Program or unconvinced of the benefits of providing their survey input to the study.

The data from the completed business surveys were computerized and tabulated. The key findings and detailed tabulations are provided in Sections 8.4.2 and 8.4.3, respectively.

118 Avenue Business Improvement Program

SURVEY OF BUSINESSES

This Survey Will Be Kept Strictly Confidential

OFFICE USE ONLY

1. **Name of Business** ____________________
2. **Operating Address** ____________________ 1-2
3. **Type of business** (for example, shoe store, automotive service and repair, etc.) ____________________
____________________ 3-5
4. **What is the approximate floor area occupied by your business, including storage and office space?** 6-10
____________ square feet
5. **a) Present number of full-time employees at this location** (____________) 11-12
b) Present number of part-time employees at this location (____________) 13-14
6. **This business is:**
Independently owned ☐ 1 Franchise operation ☐ 2 Branch office ☐ 3 15
7. **a) Do you own or rent the business premises?**
Own ☐ 1 Rent ☐ 2 16

If you rent the premises, what are your space rental costs?
b) $____________ per square foot, or 17-21
c) $____________ per month, or 22-26
d) $____________ per year 27-32
8. **Approximately how long has the business been in operation at the present location?**
2 years or less ☐ 1 3 to 5 years ☐ 2 6 to 10 years ☐ 3 More than 10 years ☐ 4 33
9. **What are the hours of operation of this business?**
a) Monday _____ a.m. to _____ p.m. 34-41
b) Tuesday _____ a.m. to _____ p.m. 42-49
c) Wednesday _____ a.m. to _____ p.m. 50-57
d) Thursday _____ a.m. to _____ p.m. 58-65
e) Friday _____ a.m. to _____ p.m. 66-73
f) Saturday _____ a.m. to _____ p.m. 74-81
g) Sunday _____ a.m. to _____ p.m. 82-89
10. **What are your daily peak sales periods?** (please check)
9:00 a.m. - 11:00 a.m. ☐ 1 11:01 a.m. - 1:00 p.m. ☐ 2 1:01 p.m. - 3:00 p.m. ☐ 3 90-91
3:01 p.m. - 5:00 p.m. ☐ 4 5:01 p.m. - 7:00 p.m. ☐ 5 7:01 p.m. - 9:00 p.m. ☐ 6
Other (please specify) ____________________ ☐ 7
11. **What are the approximate gross annual sales of your business?**
$ 50,000 or less ☐ 1 $ 50,00 1 - 100,000 ☐ 2 $100,001 - 250,000 ☐ 3 92
$250,001 - 500,000 ☐ 4 $500,001 - 1,000,000 ☐ 5 More than $1,000,000 ☐ 6
12. **What percentage of your sales are normally derived from:**
Other businesses, institutions, government agencies? (____________) % 93-95
Residents and households? (____________) % 96-98
Other (please specify)? ____________ (____________) % 99-101
____
TOTAL 100%
13. **a) What are your plans for this business in the next two or three years?**
(Please check one or more of the following.)
Close the business ☐ 1 Sell the business ☐ 2 102-104
Move business to another location ☐ 3 Remain as is ☐ 4
Expand the business ☐ 5 Renovate the business (modernize, new store front, etc.) ☐ 6
Change the types of goods and services offered ☐ 7
Other (describe) ____________________ ☐ 8

b) Do you expect any difficulties or problems in carrying-out these changes or modifications? (For example, zoning approvals, (licensing, etc.) **If so, please describe.**
____________________ 105-106
____
____

107

14. a) Would you say that it is getting easier or harder to operate a business in this area?
Easier ☐ 1 Harder ☐ 2 No Change ☐ 3 107
Don't Know/Not Sure ☐ 4

b) Please explain. ________________________________ 108-109
____
____

15. What do you think constitutes your primary market area?
Adjacent neighborhood areas ☐ 1 Northeast Edmonton area ☐ 2 110
City of Edmonton & surrounding areas ☐ 3 Other (please specify) ________________ ☐ 4
____

16. What would you say are the greatest disadvantages or problems facing the 118th Avenue business community? (Please check up to three items.)
Traffic congestion ☐ 111
Parking availability ☐ 112
Competition from shopping centres or malls ☐ 113
Inadequate "mix" of businesses along 118th Ave. ☐ 114
Physical appearance of the business area ☐ 115
No coordinated promotion of business area ☐ 116
Economic conditions in adjoining neighborhoods ☐ 117
Planning controls or regulations ☐ 118
Management practices or capabilities of the 118th Avenue business operators ☐ 119
Absentee ownership of properties in the area ☐ 120
Other (please specify) ________________________________ ☐ 121

17. What would you say are the greatest assets or most positive features of the 118th Avenue business community? (Please check up to three items.)
Parking availability ☐ 122
Convenience to nearby neighborhoods ☐ 123
Good transportation access to the area ☐ 124
Physical appearance of the business area ☐ 125
Good mix or selection of goods & services ☐ 126
Low business operating costs ☐ 127
Personalized service to customers ☐ 128
Management capabilities of local operators ☐ 129
Established clientele ☐ 130
Other (please specify) ________________________________ ☐ 131

18. What type(s) of parking facilities serve your customers? (If appropriate, check more than one.)
On-site parking provided by business ☐ 1
Parking provided by another business but shared ☐ 2 132-134
Publicly-owned off-street parking ☐ 3
Street parking ☐ 4
Other (please specify) ________________________________ ☐ 5

19. a) Do you provide off-street parking for your employees?
Yes ☐ 1 No ☐ 2 135

b) If you do provide off-street parking, what is the approximate number of parking stalls that you have?
For customers (____________) 136-138
For employees (____________) 139-141
Total (____________) 142-144

20. a) How would you describe the parking situation for your customers? (Please check)
Satisfactory ☐ 1 Not Satisfactory ☐ 2 Don't Know/Not Sure ☐ 3 145

b) Comments: ________________________________ 146-147
____

21. a) How do you think the types of business nearby affect your business operation?
(Please check)
Help or complement your business ☐ 1 Compete with or take away business ☐ 2 148
Have no effect one way or the other ☐ 3 Don't Know/Not Sure ☐ 4

b) Comments ________________________________ 149
____

22. Looking back over the past three or four years, how much would you say that the following have improved or worsened over the period? (Please circle the appropriate number for each item.)

	Much Improved	Some Improvement	About the Same	Somewhat Poorer	Much Poorer	Don't Know No Opinion	
a) Parking situation for your customers.	1	2	3	4	5	6	150
b) Your firm's profitability	1	2	3	4	5	6	151
c) The overall profitability of other firms along 118th Avenue (your impression).	1	2	3	4	5	6	152
d) The types or mix of businesses in the area.	1	2	3	4	5	6	153
e) Traffic situation.	1	2	3	4	5	6	154
f) The strength of the business community on 118th Avenue.	1	2	3	4	5	6	155
g) The economic conditions of the nearby residential areas	1	2	3	4	5	6	156
h) The stability of the businesses in the area.	1	2	3	4	5	6	157

23. a) What do you think are the long-term prospects for your business at its present location?
Excellent ☐ 1 Good ☐ 2 Fair ☐ 3 Poor ☐ 4 Don't Know/Not Sure ☐ 5 158

b) Comments: ______________________________ 159

____

24. a) Do you think you would benefit from a government program which provides direct management and merchandising assistance to businesses?
Yes ☐ 1 No ☐ 2 Don/t Know/Not Sure ☐ 3 160

b) Would you be interested in participating in such a program?
Yes ☐ 1 No ☐ 2 Don't Know/Not Sure ☐ 3 161

25. Are you aware of the business improvement program for the 118th Avenue area that is now being carried out?
Yes ☐ 1 No ☐ 2 162

26. Do you feel that improvements are required to attract more people to 118 Avenue?
Yes ☐ 1 No ☐ 2 Don't Know/Not Sure ☐ 3 163

27. What changes would you like to see in the 118th Avenue commercial area? (Check up to three items)

Improved parking (specify) ____________ ☐ 164
Storefront improvements ☐ 165
Attract new types of businesses (specify) ____________ ☐ 166
Area beautification (landscaping, trees, benches, improved signage, etc.) ☐ 167
Stronger business organization ☐ 168
Joint promotion & marketing by firms in the area ☐ 169
Special events activities ☐ 170
Development of a distinctive theme or image for the area ☐ 171
Uniform store hours ☐ 172
Improved traffic flow ☐ 173
Other changes (specify) ______________________________ ☐ 174
No changes required ☐ 175

28. a) Is your business represented in the East Edmonton Business Association?
Yes ☐ 1 No ☐ 2 176

b) Would you be prepared to contribute your time and expertise to programs and activities aimed at improving the 118th Avenue business community?
Yes ☐ 1 No ☐ 2 Depends/Don't Know ☐ 3 177

29. Would you be interested in participating in a joint marketing or promotional campaign with other businesses in the area?
Yes ☐ 1 No ☐ 2 Depends/Don't Know ☐ 3 178

30. a) Would you be willing to contribute financially to improvements along 118th Avenue?
Yes ☐ 1 No ☐ 2 Depends/Don't Know ☐ 3 179

If yes, in what form? (Check those you approve.)
b) Increased local improvement or business taxes ☐ 180
c) Voluntary donations ☐ 181
d) By participating in special fund raising activities ☐ 182
e) Other (please specify) ________________________ ☐ 183

31. Do you have any thoughts as to possible facility improvements, programs, activities, or local images or themes which might help to strengthen the 118th Avenue business district? 184-186
____
____
____
____

Name of respondent: ________________________

Position: ________________________

8.4.2 Survey Findings

A summary of the responses to the business survey is discussed below.

Questions 1 to 3 provided identification and descriptive information about the respondents.

Question 4. What is the approximate floor area occupied by your business?

The average floor area occupied by respondents was approximately 2900 square feet, with a range from 200 square feet to 25,000 square feet. The total floor area for the 55 respondents who answered the question amounted to 159,000 square feet.

Question 5. What is the present number of full and part-time employees at this location?

The number of employees indicated by the respondents totalled 216 full-time and 68 part-time employees. On average, the respondent firms employed approximately 4 full-time and one part-time employee.

Question 6. What is the type of ownership of the business?

Ninety percent of the respondent businesses are independently-owned. The remaining establishments are branch offices (8%) or franchise operations (2%).

Question 7. Are the business premises owned or rented?

Sixty-four percent of the businesses are rented, the remainder are owned. This tenure mix is significant in terms of the Business Improvement Program: the predominance of rental premises suggests the need to involve property owners in the Program and, as well, the potentially limited capability of the business operators to effect changes requiring property improvements and a financial commitment.

Question 8. How long has the business been in operation at the present location?

The business area appears to be well-established: only 18% of businesses have been in operation two years or less. More than one-half of establishments have operated on 118th Avenue for more than five years, and many of those for more than ten years.

Question 9. What are the hours of operation of this business?

Most of the food and drug stores in the study area are open six or seven days a week, and late closing hours of between 9:00 p.m. and 11:00 p.m. are normal. Most other retail outlets are open from approximately 9:00 a.m. to 5:30 p.m., with late night closing on Thursdays or Fridays. The hours of operation of local businesses appear to vary quite considerably and a greater uniformity or consistency of operating hours may be desirable in terms of attracting shoppers to the area.

Question 10. What are your daily peak sales periods?

Although the peak sales periods may vary according to the type of business, the busiest periods in declining order of importance, appear to be 9:00 a.m. to 11:00 a.m., 11:00 a.m. - 1:00 p.m., and 3:00 p.m. to 5:00 p.m.

Question 11. What are the approximate gross annual sales of your business?

Many of the business respondents are of modest size, based on the sales figures provided. Almost two-thirds (63%) of the businesses surveyed have sales of less than $250,000 per year, and more than three-quarters (78%) have sales below $500,000 annually.

Question 12. What percentage of your sales is derived from individual consumers as compared to business, institutional, and government sources?

It appears that the businesses surveyed are oriented primarily to the household market, which accounts for roughly two-thirds of total sales. Business, institutional, and government markets account for most of the remaining sales.

Question 13a) What are your plans for the business in the next two or three years?

Twenty percent of the respondents expect to close, sell, or move the business operation over the next two or three years. Another 46% expect the business operation to remain unchanged. It is encouraging and perhaps surprising to note that a further 32% propose to expand or renovate the business or to change the types of goods and services offered. The B.I.P. may be used to reinforce these changes and possibly to assist the merchants to maximize the impact of the new initiatives.

Question 14. Would you say it is getting easier or harder to operate a business in this area?

		% OF RESPONDENTS
Responses	Easier	2
	Harder	46
	No change	32
	Not Sure	20
	TOTAL	100

It is significant that almost one-half of the business respondents feel that it is getting more difficult to operate in the area.

A number of respondents offered explanations for the increasingly severe business environment. Parking inadequacies and restrictions were cited most frequently. Other factors mentioned included: traffic congestion, increased competition and surplus of specific types of outlets, break-ins and the growing number of transients in the area, deteriorating economic conditions in the area, and the road closures and one-way streets in the adjoining neighborhoods.

Question 15. What do you think constitutes your primary market area?

Refer to Section 8.4.3 for detailed tabulations.

Question 16. What would you say are the greatest disadvantages or problems facing the 118th Avenue business community?

DISADVANTAGE	% OF RESPONDENTS
Traffic Congestion	39
Parking Availability	53
Competition From Shopping Centres	25
Inadequate "Mix" of Businesses Along 118th Avenue	19
Physical Appearance of Business Area	40
No Coordinated Promotion	19
Economic Conditions in Adjoining Neighborhoods	39
Planning Controls or Regulations	14
Management Practices or Capabilities of Business Operations	4
Absentee Ownership of Properties	4
Other *	14

* Qualitative responses included parking restrictions, too many similar outlets, one-way streets, theft and vandalism, and dirty streets.

In order of significance, parking availability, the physical appearance of the area, traffic congestion, and the economic conditions in the adjoining neighborhoods are cited as the major problems facing local businesses.

Question 17. What would you say are the greatest assets of the 118th Avenue business community?

Asset	% of respondents
Parking availability	22
Convenience to nearby neighborhoods	38
Good transportation access to the area	38
Physical appearance of business area	2
Good mix or selection of goods and services	13
Low business operating costs	38
Personalized service to customers	49
Management capabilities of local operators	9
Established clientele	45
Other	7

The primary advantages of the 118th Avenue business community, as perceived by local merchants, include the personalized service offered to customers, the established clientele, the convenience and transportation accessibility to the area, and the low business operating costs.

Question 18. What types of parking facilities serve your customers?

The business respondents indicated that there are between one and two (average 1.6) types of parking facilities available for their customers. Publicly-owned off-street parking was cited by 42% of respondents, privately owned or shared parking by 34%, and street parking by 23%. These figures should be used cautiously because of possible misinterpretations by respondents of the various parking types. For example, the Safeway parking lot, through privately owned, may be perceived by some individuals as being publicly-owned off-street parking.

Question 19. Do you provide off-street parking for your employees?

The local businesses appear to be approximately evenly-split between those that provide parking for their employees and those that do not.

Question 20. How would you describe the parking situation for your customers?

The businesses are roughly evenly split between those that feel the parking situation is satisfactory and those that feel it is unsatisfactory.

A number of respondents provided qualitative comments regarding the parking situation, and these are summarized below:

- there is no parking on 80 Street - it should be widened to allow parking on one side;
- too many vehicles parked by owners and their families;
- good parking off 118th Avenue;
- opening of Yellowhead should eliminate rush hour parking restrictions;
- often chaotic;
- some cars seem to be parked all day while the owner works elsewhere;
- Avenue or side street parking adequate for number of customers on any day;
- satisfactory, because we had to build our own!
- problems every day with parking;
- many people don't realize we have a parking lot. Cars are often parked on the adjacent streets and left all day while the drivers take bus to work. (Respondent located near 97 Street.);
- businessmen have their cars parked on the Avenue during the day;
- we have a one-hour limit but some people park the whole day;
- absolutely terrible!
- there is no parking allowed in front of liquor store. There is not reason for this restriction. Approximately seven cars could be accommodated if this was changed to 20 minute parking.

Question 21. How do you think the types of businesses nearby affect your business operation?

Forty-four percent of respondents believe that the nearby businesses have no effect on their own operations one way or another; another 11% of respondents don't know or are unsure of the effect of the neighbouring businesses.

These findings suggest opportunities for complementary and cooperative business improvement measures designed to strengthen the overall commercial draw of the study area. Only 7% of respondents believe that the nearby businesses compete with them, and in specific instances, it may be demonstrated that an increase in competition may have a net beneficial impact on the existing services and facilities.

Question 22. Looking back over the past three or four years, how much would you say that the following have improved or worsened over the period?

	% of Respondents			
	Poorer Or Much Poorer	Same	Improved Or Much Improved	Don't Know
Parking situation for your customers.	24	56	13	7
Your firm's profitability.	23	33	38	6
The overall profitability of other local firms.	42	26	8	24
The mix of businesses in the area.	38	44	10	8
Traffic situation.	43	39	16	2
Strength of the business community on 118th Avenue	28	48	14	10
Economic conditions of the nearby residentail areas.	61	33	-	6
Stability of businesses in the area	39	45	2	14

In terms of most of the economic indicators shown, it is generally perceived that local conditions have deteriorated in recent years. The one exception relates to the profitability of the responding firms. The areas of greatest concensus appear to be that the economic conditions of nearby areas have declined, that the traffic situation has deteriorated, and that the mix and stability of local businesses have worsened.

Question 23. What do you think are the long-term prospects for your business at its present location?

Contrary to the many negative findings and perceptions derived from earlier survey questions, more than two-thirds of the responding businesses believe that their long-term prospects are good or excellent and only 12% believe they are poor.

Question 24. Do you think you would benefit from a government program which provides direct management and merchandising assistance to businesses? Would you be interested in participating in such a program?

Slightly less than one-third of the responding businesses believe they would benefit from the program and are interested in participating in it. The remaining respondents are approximately equally split between those who are uninterested in the program and those who are unsure whether they would benefit or participate.

Question 25. Are you aware of the Business Improvement Program for the 118th Avenue that is now being carried out?

Slightly less than one-half of the respondents are aware of the 118th Avenue B.I.P. It can probably be assumed that the awareness of non-respondents is lower.

The findings indicate the need to increase the awareness and interest in the Program by the business community if a high level of local support and participation is to be obtained.

Question 26. Do you feel that improvements are required to attract more people to 118th Avenue?

An overwhelming 81% of respondents feel that improvements are required. Most of the remaining business operators expressed a "Don't Know/Not Sure" response. Only one respondent felt that no improvements are necessary.

Question 27. What changes would you like to see in the 118th Avenue commercial area?

	% of Respondents Indicating
Improved parking	53
Storefront improvements	40
New types of businesses	22
Area beautification	26
Stronger business organization	10
Joint promotion and marketing	16
Special events activities	10
Development of theme or image for the area	35
Uniform store hours	16
Improved traffic flow	71
Other Changes	5

Traffic and parking-related improvements appear to be of highest priority to the businesses responding to the survey, with storefront improvements and the development of a distinctive theme or image for the area also given a considerable weighting.

Question 28(a). Is your business represented in the East Edmonton Business Association?

The respondent firms are roughly equally split between those that are members of the E.E.B.A. and those that aren't. The fact that many potential participants in the B.I.P. are not members of the E.E.B.A. should be recognized in the organization and management of the Program.

Question 28(b). Would you be prepared to contribute your time and expertise to programs aimed at improving the 118th Avenue business community?

	% of Responses
Yes	25
No	17
Don't Know	58
TOTAL	100

The significance of the "Don't Know" responses indicates a need to increase the awareness of the B.I.P. and to improve the understanding of the potential commercial benefits that could accrue to businesses in the area from a successful program. A high level of participation and commitment to the program is a necessary precondition to its success.

Question 29. Would you be interested in participating in a joint marketing or promotional campaign with other businesses in the area?

	% of Responses
Yes	24
No	19
Don't Know	57
TOTAL	100

The results for this question are consistent with those in Question 28.

Question 30. Would you be willing to contribute financially to improvements along 118th Avenue?

	% of Responses
Yes	2
No	36
Don't Know	62
TOTAL	100

Few respondents indicated positively that they would be prepared to contribute financially. The predominance of negative and non-committal responses may suggest a limited financial capability on the part of the businesses and/or a lack of knowledge regarding the nature and purposes of the B.I.P.

Question 31. Do you have any thoughts as to possible facility improvements, programs, activities, or local images or themes which might help to strengthen the 118th Avenue business district?

Some of the qualitative responses to this question are summarized below:

- Remove one-way streets north of 118th Avenue.
- Improved parking facilities would be a major asset to all businesses.
- Improve parking and the mix of businesses.

- More government businesses, employment agencies to bring people from outside the area. More outdoor (in summer) dances, band concerts, etc. If we had street patrols by police, we could stay open nights.
- Follow western and ethnic draw - need some new large commercial developments - hotels, etc. More good entertainment, flea markets, antiques, arts, and music cultural shops - 24 hour outlets.
- Restrict parking on streets adjoining 118th Avenue to one-hour parking.
- Introduce a series of seminars on management, the importance of store appearance, etc.
- A few better restaurants, ladies and men's dress shops; a city-wide circulated flyer announcing our businesses, products, and services.
- Cleaned store-front windows and sidewalks would be a great improvement.
- Our parking problem seems to stem mainly from lack of control or consideration by City Hall. They grant business licenses to restaurants, bars, stores, etc. without considering and insisting on need for sufficient private or off-street parking facilities.
- Due to the relatively low rents. I believe owners should upgrade second-storey buildings into offices, and eliminate apartments above their stores.
- Instal a public washroom somewhere in the centre of the area.

8.3.4 Survey Tabulations

The computerized tabulations of the business surveys are included on the following pages.

CODE = Number of
Full-Time Employees
99 = No Answer

```
Business Survey

05A       # of full-time employees

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PEJCENT)   (PERCENT)
                           1        14       22.6        25.5        25.5
                           2        14       22.6        25.5        50.9
                           3         5        8.1         9.1        60.0
                           4         4        6.5         7.3        67.3
                           5         7       11.3        12.7        80.0
                           6         4        6.5         7.3        87.3
                           7         1        1.6         1.8        89.1
                           8         1        1.6         1.8        90.9
                          10         1        1.6         1.8        92.7
                          11         1        1.6         1.8        94.5
                          12         1        1.6         1.8        96.4
                          16         1        1.6         1.8        98.2
                          20         1        1.6         1.8       100.0
                          99         7       11.3     MISSING       100.0
                               -------    -------     -------
                       TOTAL        62      100.0       100.0

VALID CASES      55      MISSING CASES     7
```

CODE = Number of
Part-Time Employees

```
Business Survey

05B       # of part-time employees

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)
                           1        10       16.1        47.6        47.6
                           2         4        6.5        19.0        66.7
                           3         2        3.2         9.5        76.2
                           4         1        1.6         4.8        81.0
                           5         1        1.6         4.8        85.7
                           6         1        1.6         4.8        90.5
                          11         1        1.6         4.8        95.2
                          16         1        1.6         4.8       100.0
                                    41       66.1     MISSING       100.0
                               -------    -------     -------
                       TOTAL        62      100.0       100.0

VALID CASES      21      MISSING CASES    41
```

```
Business Survey

06        Type of business ownership

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)
Independently owned        1        54       87.1        90.0        90.0
Franchise operation        2         1        1.6         1.7        91.7
Branch office              3         5        8.1         8.3       100.0
                           9         2        3.2     MISSING       100.0
                               -------    -------     -------
                       TOTAL        62      100.0       100.0

VALID CASES      60      MISSING CASES     2
```

```
Business Survey

Q7A       rent or own building?

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)

Own                        1        22       35.5        36.1        36.1

Rent                       2        39       62.9        63.9       100.0

                           9         1        1.6     MISSING       100.0
                                -------    -------     -------
                       TOTAL        62      100.0       100.0

VALID CASES      61      MISSING CASES      1
```

```
Business Survey

Q8        # of years business in operation

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)

< 3 Years                  1        11       17.7        18.3        18.3

3-5 years                  2        16       25.8        26.7        45.0

5-10 Years                 3        10       16.1        16.7        61.7

> 10 Years                 4        23       37.1        38.3       100.0

                           9         2        3.2     MISSING       100.0
                                -------    -------     -------
                       TOTAL        62      100.0       100.0

VALID CASES      60      MISSING CASES      2
```

```
Business Survey

Q10A      Daily peak sales periods

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)

9:00-11:00                 1        17       27.4        32.1        32.1

11:01-13:00                2        14       22.6        26.4        58.5

13:01-15:00                3         5        8.1         9.4        67.9

15:01-17:00                4         4        6.5         7.5        75.5

17:01-19:00                5         2        3.2         3.8        79.2

19:01-21:00                6         2        3.2         3.8        83.0

Other                      7         9       14.5        17.0       100.0

Blank                      9         9       14.5     MISSING       100.0
                                -------    -------     -------
                       TOTAL        62      100.0       100.0

VALID CASES      53      MISSING CASES      9
```

CODE = % of Sales to Residents and Households

```
Business Survey

Q12B      % sales to residents and households
                                                RELATIVE   ADJUSTED  CUMULATIVE
                                 ABSOLUTE      FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY      (PERCENT)  (PERCENT)   (PERCENT)

                           20          2          3.2        5.1         5.1
                           25          1          1.6        2.6         7.7
                           30          1          1.6        2.6        10.3
                           35          1          1.6        2.6        12.8
                           40          3          4.8        7.7        20.5
                           50          4          6.5       10.3        30.8
                           60          2          3.2        5.1        35.9
                           70          1          1.6        2.6        38.5
                           75          2          3.2        5.1        43.6
                           80          4          6.5       10.3        53.8
                           85          3          4.8        7.7        61.5
                           90          2          3.2        5.1        66.7
                           95          2          3.2        5.1        71.8
                           99          1          1.6        2.6        74.4
                          100         10         16.1       25.6       100.0
                          999         23         37.1      MISSING     100.0
                                 -------      -------    -------
                        TOTAL         62        100.0      100.0

VALID CASES      39      MISSING CASES      23
```

```
Business Survey

Q12C      % sales to other sources
                                                RELATIVE   ADJUSTED  CUMULATIVE
                                 ABSOLUTE      FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY      (PERCENT)  (PERCENT)   (PERCENT)

                           15          1          1.6       10.0        10.0
                           20          1          1.6       10.0        20.0
                           25          2          3.2       20.0        40.0
                           30          2          3.2       20.0        60.0
                           60          1          1.6       10.0        70.0
                           70          2          3.2       20.0        90.0
                          100          1          1.6       10.0       100.0
                          999         52         83.9      MISSING     100.0
                                 -------      -------    -------
                        TOTAL         62        100.0      100.0

VALID CASES      10      MISSING CASES      52
```

```
Business Survey

Q10B      Daily peak sales periods

                                                RELATIVE    ADJUSTED   CUMULATIVE
                                   ABSOLUTE    FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL             CODE   FREQUENCY    (PERCENT)   (PERCENT)    (PERCENT)

11:01-13:00                   2           5          8.1        16.1         16.1
13:01-15:00                   3           7         11.3        22.6         38.7
15:01-17:00                   4          10         16.1        32.3         71.0
17:01-19:00                   5           4          6.5        12.9         83.9
19:01-21:00                   6           3          4.8         9.7         93.5
Other                         7           2          3.2         6.5        100.0
Blank                         0          31         50.0     MISSING        100.0
                                    -------      -------     -------
                          TOTAL          62        100.0       100.0

VALID CASES       31       MISSING CASES     31
```

```
Business Survey

Q11       Gross annual sales

                                                RELATIVE    ADJUSTED   CUMULATIVE
                                   ABSOLUTE    FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL             CODE   FREQUENCY    (PERCENT)   (PERCENT)    (PERCENT)

< $50,000                     1          12         19.4        24.5         24.5
$50,001-100,000               2           7         11.3        14.3         38.8
$100,001-250,000              3          12         19.4        24.5         63.3
$250,001-500,000              4           7         11.3        14.3         77.6
$500,001-1,000,000            5           5          8.1        10.2         87.8
> $1,000,000                  6           6          9.7        12.2        100.0
                              0          13         21.0     MISSING        100.0
                                    -------      -------     -------
                          TOTAL          62        100.0       100.0

VALID CASES       49       MISSING CASES     13
```

```
Business Survey

Q13A      % sales to Gov't/other businesses

                                                RELATIVE    ADJUSTED   CUMULATIVE
                                   ABSOLUTE    FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL             CODE   FREQUENCY    (PERCENT)   (PERCENT)    (PERCENT)

                              1           1          1.6         2.9          2.9
                              2           1          1.6         2.9          5.7
                              5           2          3.2         5.7         11.4
                             10           6          9.7        17.1         28.6
                             15           5          8.1        14.3         42.9
                             20           3          4.8         8.6         51.4
                             25           1          1.6         2.9         54.3
                             40           1          1.6         2.9         57.1
                             50           4          6.5        11.4         68.6
                             60           3          4.8         8.6         77.1
                             65           1          1.6         2.9         80.0
                             70           1          1.6         2.9         82.9
                             75           2          3.2         5.7         88.6
                            100           4          6.5        11.4        100.0
                            999          27         43.5     MISSING        100.0
                                    -------      -------     -------
                          TOTAL          62        100.0       100.0

VALID CASES       35       MISSING CASES     27
```

CODE = % of Sales
to Businesses and Government
Agencies

```
Business Survey

Q13A1     Plans for business in next 2-3 years

                                           RELATIVE    ADJUSTED  CUMULATIVE
                              ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY    (PERCENT)   (PERCENT)   (PERCENT)

Close                    1           1          1.6         1.8         1.8

Sell                     2           2          3.2         3.6         5.4

Move                     3          11         17.7        19.6        25.0

Remain as is             4          31         50.0        55.4        80.4

Expand                   5           9         14.5        16.1        96.4

Renovate                 6           2          3.2         3.6       100.0

                         9           6          9.7     MISSING       100.0
                               -------      -------     -------
                     TOTAL          62        100.0       100.0

VALID CASES       56      MISSING CASES      6
```

```
Business Survey

Q13A2     Plans for business in next 2-3 years

                                           RELATIVE    ADJUSTED  CUMULATIVE
                              ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY    (PERCENT)   (PERCENT)   (PERCENT)

Sell                     2           1          1.6         6.7         6.7

Remain as is             4           2          3.2        13.3        20.0

Expand                   5           1          1.6         6.7        26.7

Renovate                 6           7         11.3        46.7        73.3

Change                   7           2          3.2        13.3        86.7

Other                    8           2          3.2        13.3       100.0

                         9          47         75.8     MISSING       100.0
                               -------      -------     -------
                     TOTAL          62        100.0       100.0

VALID CASES       15      MISSING CASES     47
```

```
Business Survey

Q13A3     Plans for business in next 2-3 years

                                           RELATIVE    ADJUSTED  CUMULATIVE
                              ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY    (PERCENT)   (PERCENT)   (PERCENT)

Remain as is             4           2          3.2        40.0        40.0

Expand                   5           1          1.6        20.0        60.0

Renovate                 6           1          1.6        20.0        80.0

Change                   7           1          1.6        20.0       100.0

                         9          57         91.9     MISSING       100.0
                               -------      -------     -------
                     TOTAL          62        100.0       100.0

VALID CASES        5      MISSING CASES     57
```

```
Business Survey

Q13B      Expect problems making changes

                                           RELATIVE    ADJUSTED  CUMULATIVE
                              ABSOLUTE    FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY    (PERCENT)   (PERCENT)   (PERCENT)

No                       1          16         25.8        88.9        88.9

Yes                      2           2          3.2        11.1       100.0

                        99          44         71.0     MISSING       100.0
                               -------      -------     -------
                     TOTAL          62        100.0       100.0

VALID CASES       18      MISSING CASES     44
```

```
Business Survey

Q14A     Easier or Harder to operate Business?

                                            RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE    FREQUENCY  FREQUENCY     ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY    (PERCENT)  (PERCENT)    (PERCENT)
Easier                    1          1         1.6        1.7          1.7
Harder                    2         27        43.5       45.8         47.5
No change                 3         19        30.6       32.2         79.7
Not sure                  4         12        19.4       20.3        100.0
                          9          3         4.8    MISSING        100.0
                              -------     -------    -------
                      TOTAL         62       100.0      100.0

VALID CASES      59      MISSING CASES     3
```

```
Business Survey

Q15      Primary market area

                                            RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE    FREQUENCY  FREQUENCY     ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY    (PERCENT)  (PERCENT)    (PERCENT)
Adjacent areas            1          9        14.5       17.6         17.6
Northeast Sdm             2         14        22.6       27.5         45.1
Entire Sdm Area           3         24        38.7       47.1         92.2
Other                     4          4         6.5        7.8        100.0
                          9         11        17.7    MISSING        100.0
                              -------     -------    -------
                      TOTAL         62       100.0      100.0

VALID CASES      51      MISSING CASES    11
```

```
Business Survey

Q16A     Disadvantage  Traffic congestion

                                            RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE    FREQUENCY  FREQUENCY     ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY    (PERCENT)  (PERCENT)    (PERCENT)
Not indicated             0         35        56.5       61.4         61.4
Indicated                 1         22        35.5       38.6        100.0
                          9          5         8.1    MISSING        100.0
                              -------     -------    -------
                      TOTAL         62       100.0      100.0

VALID CASES      57      MISSING CASES     5
```

```
Business Survey

Q16B     Disadvantage  Parking availability

                                            RELATIVE   ADJUSTED   CUMULATIVE
                              ABSOLUTE    FREQUENCY  FREQUENCY     ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY    (PERCENT)  (PERCENT)    (PERCENT)
Not indicated             0         27        43.5       47.4         47.4
Indicated                 1         30        48.4       52.6        100.0
                          9          5         8.1    MISSING        100.0
                              -------     -------    -------
                      TOTAL         62       100.0      100.0

VALID CASES      57      MISSING CASES     5
```

```
Business Survey

Q16C      Disadvantage: Competition-shopping malls   .

                                           RELATIVE   ADJUSTED  CUMULATIVE
                                ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Not indicated               0        43       69.3       75.4        75.4

Indicated                   1        14       22.6       24.6       100.0

                            9         5        8.1    MISSING       100.0
                               -------    -------    -------
                        TOTAL        62      100.0      100.0

VALID CASES      57      MISSING CASES     5
```

```
Business Survey

Q16D      Disadvantage  Business mix

                                           RELATIVE   ADJUSTED  CUMULATIVE
                                ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Not indicated               0        46       74.2       80.7        80.7

Indicated                   1        11       17.7       19.3       100.0

                            9         5        8.1    MISSING       100.0
                               -------    -------    -------
                        TOTAL        62      100.0      100.0

VALID CASES      57      MISSING CASES     5
```

```
Business Survey

Q16E      Disadvantage  Appearance of area

                                           RELATIVE   ADJUSTED  CUMULATIVE
                                ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Not indicated               0        34       54.8       59.6        59.6

Indicated                   1        23       37.1       40.4       100.0

                            9         5        8.1    MISSING       100.0
                               -------    -------    -------
                        TOTAL        62      100.0      100.0

VALID CASES      57      MISSING CASES     5
```

```
Business Survey

Q16F      Disadvantage: No promotion of area

                                           RELATIVE   ADJUSTED  CUMULATIVE
                                ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Not indicated               0        46       74.2       80.3        80.3

Indicated                   1        11       17.7       19.7       100.0

                            9         5        8.1    MISSING       100.0
                               -------    -------    -------
                        TOTAL        62      100.0      100.0

VALID CASES      57      MISSING CASES     5
```

```
Business Survey

Q16G      Disadvantage: N'hood economic condition

                                             RELATIVE   ADJUSTED   CUMULATIVE
                                 ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Not indicated               0         35       56.5       61.4        61.4

Indicated                   1         22       35.5       38.6       100.0

                            9          5        8.1    MISSING       100.0
                                  -------    -------    -------
                        TOTAL         62      100.0      100.0

VALID CASES       57       MISSING CASES      5
```

```
Business Survey

Q16H      Disadvantage: Planning regulations

                                             RELATIVE   ADJUSTED   CUMULATIVE
                                 ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Not indicated               0         49       79.0       86.0        86.0

Indicated                   1          8       12.9       14.0       100.0

                            9          5        8.1    MISSING       100.0
                                  -------    -------    -------
                        TOTAL         62      100.0      100.0

VALID CASES       57       MISSING CASES      5
```

```
Business Survey

Q16I      Disadvantage: Management capabilities

                                             RELATIVE   ADJUSTED   CUMULATIVE
                                 ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Not indicated               0         55       88.7       96.5        96.5

Indicated                   1          2        3.2        3.5       100.0

                            9          5        8.1    MISSING       100.0
                                  -------    -------    -------
                        TOTAL         62      100.0      100.0

VALID CASES       57       MISSING CASES      5
```

```
Business Survey

Q16J      Disadvantage: Absentee ownership

                                             RELATIVE   ADJUSTED   CUMULATIVE
                                 ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Not indicated               0         55       88.7       96.5        96.5

Indicated                   1          2        3.2        3.5       100.0

                            9          5        8.1    MISSING       100.0
                                  -------    -------    -------
                        TOTAL         62      100.0      100.0

VALID CASES       57       MISSING CASES      5
```

```
Business Survey

Q16K      Disadvantage: Other

                                             RELATIVE   ADJUSTED   CUMULATIVE
                                 ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL           CODE   FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Not indicated               0         49       79.0       86.0        86.0

Indicated                   1          8       12.9       14.0       100.0

                            9          5        8.1    MISSING       100.0
                                  -------    -------    -------
                        TOTAL         62      100.0      100.0

VALID CASES       57       MISSING CASES      5
```

```
Business Survey

Q17F      Asset: Low operating costs

                                          RELATIVE   ADJUSTED  CUMULATIVE
                             ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Not indicated            0         34        54.8       61.8        61.8

Indicated                1         21        33.9       38.2       100.0

                         9          7        11.3    MISSING       100.0
                              -------     -------    -------
                     TOTAL         62       100.0      100.0

VAILD CASES      55      MISSING CASES      7
```

```
Business Survey

Q17G      Asset: Personal customer service

                                          RELATIVE   ADJUSTED  CUMULATIVE
                             ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Not indicated            0         28        45.2       50.9        50.9

Indicated                1         27        43.5       49.1       100.0

                         9          7        11.3    MISSING       100.0
                              -------     -------    -------
                     TOTAL         62       100.0      100.0

VAILD CASES      55      MISSING CASES      7
```

```
Business Survey

Q17H      Asset: Management capabilities

                                          RELATIVE   ADJUSTED  CUMULATIVE
                             ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Not indicated            0         50        80.6       90.9        90.9

Indicated                1          5         8.1        9.1       100.0

                         9          7        11.3    MISSING       100.0
                              -------     -------    -------
                     TOTAL         62       100.0      100.0

VAILD CASES      55      MISSING CASES      7
```

```
Business Survey

Q17I      Asset: Established clientele

                                          RELATIVE   ADJUSTED  CUMULATIVE
                             ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Not indicated            0         30        48.4       54.5        54.5

Indicated                1         25        40.3       45.5       100.0

                         9          7        11.3    MISSING       100.0
                              -------     -------    -------
                     TOTAL         62       100.0      100.0

VAILD CASES      55      MISSING CASES      7
```

```
Business Survey

Q17J      Asset: Other

                                          RELATIVE   ADJUSTED  CUMULATIVE
                             ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Not indicated            0         51        82.3       92.7        92.7

Indicated                1          4         6.5        7.3       100.0

                         9          7        11.3    MISSING       100.0
                              -------     -------    -------
                     TOTAL         62       100.0      100.0

VAILD CASES      55      MISSING CASES      7
```

```
Business Survey

Q17A      Asset  Parking availability

                                          RELATIVE     ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY    FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)    (PERCENT)    (PERCENT)

Not indicated            0          43        69.4         78.2         78.2

Indicated                1          12        19.4         21.8        100.0

                         9           7        11.3      MISSING        100.0
                               -------     -------      -------
                     TOTAL          62       100.0        100.0

VAILD CASES       55       MISSING CASES      7
```

```
Business Survey

Q17B      Asset: Convenience to neighborhood

                                          RELATIVE     ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY    FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)    (PERCENT)    (PERCENT)

Not indicated            0          34        54.8         61.8         61.8

Indicated                1          21        33.9         38.2        100.0

                         9           7        11.3      MISSING        100.0
                               -------     -------      -------
                     TOTAL          62       100.0        100.0

VAILD CASES       55       MISSING CASES      7
```

```
Business Survey

Q17C      Asset  Transporation access

                                          RELATIVE     ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY    FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)    (PERCENT)    (PERCENT)

Not indicated            0          34        54.8         61.8         61.8

Indicated                1          21        33.9         38.2        100.0

                         9           7        11.3      MISSING        100.0
                               -------     -------      -------
                     TOTAL          62       100.0        100.0

VAILD CASES       55       MISSING CASES      7
```

```
Business Survey

Q17D      Asset  Physical appearance

                                          RELATIVE     ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY    FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)    (PERCENT)    (PERCENT)

Not indicated            0          54        87.1         98.2         98.2

Indicated                1           1         1.6          1.8        100.0

                         9           7        11.3      MISSING        100.0
                               -------     -------      -------
                     TOTAL          62       100.0        100.0

VAILD CASES       55       MISSING CASES      7
```

```
Business Survey

Q17E      Asset: Business mix

                                          RELATIVE     ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY    FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE   FREQUENCY   (PERCENT)    (PERCENT)    (PERCENT)

Not indicated            0          48        77.4         87.3         87.3

Indicated                1           7        11.3         12.7        100.0

                         9           7        11.3      MISSING        100.0
                               -------     -------      -------
                     TOTAL          62       100.0        100.0

VAILD CASES       55       MISSING CASES      7
```

```
Business Survey

Q18A      Customer parking facilities

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL         CODE   FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

On-site                   1         23       37.1        39.7         39.7

Shared                    2          5        8.1         8.6         48.3

Public-off street         3         14       22.6        24.1         72.4

Public-on street          4         16       25.8        27.6        100.0

                          9          4        6.5     MISSING        100.0
                              -------    -------     -------
                      TOTAL         62      100.0       100.0

VALID CASES      58      MISSING CASES      4
```

```
Business Survey

Q18B      Customer parking facilities

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL         CODE   FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Shared                    2          1        1.6         3.7          3.7

Public-off street         3          2        3.2         7.4         11.1

Public-on street          4         24       38.7        88.9        100.0

                          9          4        6.5     MISSING        100.0

No answer                           31       50.0     MISSING        100.0
                              -------    -------     -------
                      TOTAL         62      100.0       100.0

VALID CASES      27      MISSING CASES     35
```

```
Business Survey

Q18C      Customer parking facilities

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL         CODE   FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Public-on street          4          1        1.6       100.0        100.0

                          9          4        6.5     MISSING        100.0

No answer                           57       91.9     MISSING        100.0
                              -------    -------     -------
                      TOTAL         62      100.0       100.0

VALID CASES       1      MISSING CASES     61
```

```
Business Survey

Q19A      Off-street parking provided to employees

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL         CODE   FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Yes                       1         27       43.5        48.2         48.2

No                        2         29       46.8        51.8        100.0

                          9          6        9.7     MISSING        100.0
                              -------    -------     -------
                      TOTAL         62      100.0       100.0

VALID CASES      56      MISSING CASES      6
```

```
Business Survey

01981     # of stalls for customers

                                        RELATIVE    ADJUSTED   CUMULATIVE
                            ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL      CODE   FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)
                       1           4         6.5        21.1         21.1
                       2           1         1.6         5.3         26.3
                       3           4         6.5        21.1         47.4
                       4           4         6.5        21.1         68.4
                       5           1         1.6         5.3         73.7
                       6           2         3.2        10.5         84.2
                       7           1         1.6         5.3         89.5
                      10           1         1.6         5.3         94.7
                      18           1         1.6         5.3        100.0
                     999          43        69.3     MISSING        100.0
                             -------     -------     -------
                   TOTAL          62       100.0       100.0

VALID CASES      19      MISSING CASES     43
```

CODE =

Number of
Stalls

```
Business Survey

01982     # of stalls for employees

                                        RELATIVE    ADJUSTED   CUMULATIVE
                            ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL      CODE   FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)
                       1           9        14.5        36.0         36.0
                       2           6         9.7        24.0         60.0
                       3           3         4.8        12.0         72.0
                       4           4         6.5        16.0         88.0
                       5           1         1.6         4.0         92.0
                       7           1         1.6         4.0         96.0
                       8           1         1.6         4.0        100.0
                     999          37        59.7     MISSING        100.0
                             -------     -------     -------
                   TOTAL          62       100.0       100.0

VALID CASES      25      MISSING CASES     37
```

CODE =

Number of
Stalls

```
Business Survey

01983     Total # of stalls

                                        RELATIVE    ADJUSTED   CUMULATIVE
                            ABSOLUTE   FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL      CODE   FREQUENCY   (PERCENT)   (PERCENT)    (PERCENT)
                       1           2         3.2         6.3          6.3
                       2           8        12.9        25.0         31.3
                       3           5         8.1        15.6         46.9
                       4           4         6.5        12.5         59.4
                       6           5         8.1        15.6         75.0
                       8           1         1.6         3.1         78.1
                      10           3         4.8         9.4         87.5
                      12           1         1.6         3.1         90.6
                      14           2         3.2         6.3         96.9
                      24           1         1.6         3.1        100.0
                     999          30        48.4     MISSING        100.0
                             -------     -------     -------
                   TOTAL          62       100.0       100.0

VALID CASES      32      MISSING CASES     30
```

CODE =

Number of
Stalls

```
Business Survey

Q20A      Parking situation for customers

                                            RELATIVE   ADJUSTED  CUMULATIVE
                                ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Satisfactory               1          30        48.4       50.8        50.8

Not satisfactory           2          26        41.9       44.1        94.9

Don't know                 3           3         4.8        5.1       100.0

                           9           3         4.8    MISSING       100.0
                                 -------     -------    -------
                       TOTAL          62       100.0      100.0

VALID CASES       59      MISSING CASES      3
```

```
Business Survey

Q21A      Effect of nearby businesses

                                            RELATIVE   ADJUSTED  CUMULATIVE
                                ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Help                       1          21        33.9       38.2        38.2

Compete                    2           4         6.5        7.3        45.5

No effect                  3          24        38.7       43.6        89.1

Not sure                   4           6         9.7       10.9       100.0

                           9           7        11.3    MISSING       100.0
                                 -------     -------    -------
                       TOTAL          62       100.0      100.0

VALID CASES       55      MISSING CASES      7
```

```
Business Survey

Q22A      Customer parking

                                            RELATIVE   ADJUSTED  CUMULATIVE
                                ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Much improved              1           3         4.8        5.6         5.6

Improved                   2           4         6.5        7.4        13.0

Same                       3          30        48.4       55.6        68.5

Poorer                     4           3         4.8        5.6        74.1

Much poorer                5          10        16.1       18.5        92.6

Don't know                 6           4         6.5        7.4       100.0

                           9           8        12.9    MISSING       100.0
                                 -------     -------    -------
                       TOTAL          62       100.0      100.0

VALID CASES       54      MISSING CASES      8
```

```
Business Survey

Q22B      Firm's profitability

                                            RELATIVE   ADJUSTED  CUMULATIVE
                                ABSOLUTE   FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE   FREQUENCY   (PERCENT)  (PERCENT)   (PERCENT)

Much improved              1           4         6.5        8.3         8.3

Improved                   2          14        22.6       29.2        37.5

Same                       3          16        25.8       33.3        70.8

Poorer                     4           9        14.5       18.8        89.6

Much poorer                5           2         3.2        4.2        93.8

Don't know                 6           3         4.8        6.3       100.0

                           9          14        22.6    MISSING       100.0
                                 -------     -------    -------
                       TOTAL          62       100.0      100.0

VALID CASES       48      MISSING CASES     14
```

```
Business Survey

Q23C      Profitability of other firms

                                           RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE   FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)
Improved                   2           4        6.5         8.0          8.0
Same                       3          13       21.0        26.0         34.0
Poorer                     4          17       27.4        34.0         68.0
Much poorer                5           4        6.5         8.0         76.0
Don't know                 8          12       19.4        24.0        100.0
                           9          12       19.4     MISSING        100.0
                                 -------    -------     -------
                       TOTAL          62      100.0       100.0

VALID CASES      50      MISSING CASES     12
```

```
Business Survey

Q23D      Business mix

                                           RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE   FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)
Improved                   2           5        8.1        10.0         10.0
Same                       3          22       35.5        44.0         54.0
Poorer                     4           9       14.5        18.0         72.0
Much poorer                5          10       16.1        20.0         92.0
Don't know                 8           4        6.5         8.0        100.0
                           9          12       19.4     MISSING        100.0
                                 -------    -------     -------
                       TOTAL          62      100.0       100.0

VALID CASES      50      MISSING CASES     12
```

```
Business Survey

Q23E      Traffic situation

                                           RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE   FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)
Much improved              1           1        1.6         2.0          2.0
Improved                   2           7       11.3        13.7         15.7
Same                       3          20       32.3        39.2         54.9
Poorer                     4          11       17.7        21.6         76.5
Much poorer                5          11       17.7        21.6         98.0
Don't know                 8           1        1.6         2.0        100.0
                           9          11       17.7     MISSING        100.0
                                 -------    -------     -------
                       TOTAL          62      100.0       100.0

VALID CASES      51      MISSING CASES     11
```

```
Business Survey

022F      Strength of Business community

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Much improved              1          1        1.6        2.0         2.0

Improved                   2          6        9.7       12.0        14.0

Same                       3         24       38.7       48.0        62.0

Poorer                     4          8       12.9       16.0        78.0

Much poorer                5          6        9.7       12.0        90.0

Don't know                 6          5        8.1       10.0       100.0

                           9         12       19.4    MISSING       100.0
                               --------    -------    -------
                       TOTAL         62      100.0      100.0

VALID CASES      50      MISSING CASES    12
```

```
Business Survey

022G      Neighborhood economic conditions

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Same                       3         16       25.8       32.7        32.7

Poorer                     4         21       33.9       42.9        75.5

Much poorer                5          9       14.5       18.4        93.9

Don't know                 6          3        4.8        6.1       100.0

                           9         13       21.0    MISSING       100.0
                               --------    -------    -------
                       TOTAL         62      100.0      100.0

VALID CASES      49      MISSING CASES    13
```

```
Business Survey

022H      Stability of businesses in area

                                          RELATIVE   ADJUSTED  CUMULATIVE
                               ABSOLUTE  FREQUENCY  FREQUENCY    ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)  (PERCENT)   (PERCENT)

Improved                   2          1        1.6        2.0         2.0

Same                       3         23       37.1       45.1        47.1

Poorer                     4         16       25.8       31.4        78.4

Much poorer                5          4        6.5        7.8        86.3

Don't know                 6          7       11.3       13.7       100.0

                           9         11       17.7    MISSING       100.0
                               --------    -------    -------
                       TOTAL         62      100.0      100.0

VALID CASES      51      MISSING CASES    11
```

```
Business Survey

Q23A       Long-term prospects of business

                                          RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Excellent                 1          7        11.3        12.1        12.1

Good                      2         32        51.6        55.2        67.2

Fair                      3         10        16.1        17.2        84.5

Poor                      4          7        11.3        12.1        96.6

Not sure                  5          2         3.2         3.4       100.0

                          9          4         6.5     MISSING       100.0
                               -------     -------     -------
                      TOTAL         62       100.0       100.0

VALID CASES       58      MISSING CASES      4
```

```
Business Survey

Q24A       Benefit from gov't program

                                          RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Yes                       1         17        27.4        30.9        30.9

No                        2         19        30.6        34.5        65.5

Don't know                3         19        30.6        34.5       100.0

                          9          7        11.3     MISSING       100.0
                               -------     -------     -------
                      TOTAL         62       100.0       100.0

VALID CASES       55      MISSING CASES      7
```

```
Business Survey

Q24B       Participate in gov't program

                                          RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Yes                       1         16        25.8        29.6        29.6

No                        2         16        25.8        29.6        59.3

Don't know                3         22        35.5        40.7       100.0

                          9          8        12.9     MISSING       100.0
                               -------     -------     -------
                      TOTAL         62       100.0       100.0

VALID CASES       54      MISSING CASES      8
```

```
Business Survey

Q25        Aware of business improvement program

                                          RELATIVE    ADJUSTED   CUMULATIVE
                              ABSOLUTE   FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL         CODE  FREQUENCY   (PERCENT)   (PERCENT)   (PERCENT)

Yes                       1         28        45.2        46.7        46.7

No                        2         32        51.6        53.3       100.0

                          9          2         3.2     MISSING       100.0
                               -------     -------     -------
                      TOTAL         62       100.0       100.0

VALID CASES       60      MISSING CASES      2
```

```
Business Survey

027D      Changes  Area Beautification

                                        RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Not indicated            0         43       69.4        74.1         74.1

Indicated                1         15       24.2        25.9        100.0

                         9          4        6.5     MISSING        100.0
                             --------   --------    --------
                     TOTAL         62      100.0       100.0

VALID CASES       58      MISSING CASES       4
```

```
Business Survey

027E      Changes  Stronger business organization

                                        RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Not indicated            0         52       83.9        89.7         89.7

Indicated                1          6        9.7        10.3        100.0

                         9          4        6.5     MISSING        100.0
                             --------   --------    --------
                     TOTAL         62      100.0       100.0

VALID CASES       58      MISSING CASES       4
```

```
Business Survey

027F      Changes  Joint promotion and marketing

                                        RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Not indicated            0         49       79.0        84.5         84.5

Indicated                1          9       14.5        15.5        100.0

                         9          4        6.5     MISSING        100.0
                             --------   --------    --------
                     TOTAL         62      100.0       100.0

VALID CASES       58      MISSING CASES       4
```

```
Business Survey

027G      Changes  Special events

                                        RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Not indicated            0         52       83.9        89.7         89.7

Indicated                1          6        9.7        10.3        100.0

                         9          4        6.5     MISSING        100.0
                             --------   --------    --------
                     TOTAL         62      100.0       100.0

VALID CASES       58      MISSING CASES       4
```

```
Business Survey

027H      Changes  Theme or image of area

                                        RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Not indicated            0         38       61.3        65.5         65.5

Indicated                1         20       32.3        34.5        100.0

                         9          4        6.5     MISSING        100.0
                             --------   --------    --------
                     TOTAL         62      100.0       100.0

VALID CASES       58      MISSING CASES       4
```

```
Business Survey

Q26       Improvements are required

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Yes                        1         46       74.2        80.7         80.7

No                         2          1        1.6         1.8         82.5

Don't know                 3         10       16.1        17.5        100.0

                           9          5        8.1     MISSING        100.0
                                -------    -------     -------
                       TOTAL         62      100.0       100.0

VALID CASES      57      MISSING CASES      5
```

```
Business Survey

Q27A      Changes  Improved parking

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Not indicated              0         26       41.9        44.8         44.8

Indicated                  1         32       51.6        55.2        100.0

                           9          4        6.5     MISSING        100.0
                                -------    -------     -------
                       TOTAL         62      100.0       100.0

VALID CASES      58      MISSING CASES      4
```

```
Business Survey

Q27B      Changes  Storefront improvements

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Not indicated              0         35       56.5        60.3         60.3

Indicated                  1         23       37.1        39.7        100.0

                           9          4        6.5     MISSING        100.0
                                -------    -------     -------
                       TOTAL         62      100.0       100.0

VALID CASES      58      MISSING CASES      4
```

```
Business Survey

Q27C      Changes  New types of businesses

                                          RELATIVE    ADJUSTED   CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY     ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)    (PERCENT)

Not indicated              0         45       72.6        77.6         77.6

Indicated                  1         13       21.0        22.4        100.0

                           9          4        6.5     MISSING        100.0
                                -------    -------     -------
                       TOTAL         62      100.0       100.0

VALID CASES      58      MISSING CASES      4
```

```
Business Survey

Q27I     Changes  Uniform store hours

                                          RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL            CODE  FREQUENCY (PERCENT)   (PERCENT)   (PERCENT)

Not indicated                0        49      79.0        84.5        84.5

Indicated                    1         9      14.5        15.5       100.0

                             9         4       6.5     MISSING       100.0
                                 -------   -------     -------
                         TOTAL        62     100.0       100.0

VALID CASES      58      MISSING CASES     4
```

```
Business Survey

Q27J     Changes  Improved traffic flow

                                          RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL            CODE  FREQUENCY (PERCENT)   (PERCENT)   (PERCENT)

Indicated                    1        17      27.4        29.3        29.3

Not indicated                0        41      66.1        70.7       100.0

                             9         4       6.5     MISSING       100.0
                                 -------   -------     -------
                         TOTAL        62     100.0       100.0

VALID CASES      58      MISSING CASES     4
```

```
Business Survey

Q27K     Changes  Other

                                          RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL            CODE  FREQUENCY (PERCENT)   (PERCENT)   (PERCENT)

Not indicated                0        55      88.7        94.8        94.8

Indicated                    1         3       4.8         5.2       100.0

                             9         4       6.5     MISSING       100.0
                                 -------   -------     -------
                         TOTAL        62     100.0       100.0

VALID CASES      58      MISSING CASES     4
```

```
Business Survey

Q27L     Changes  None required

                                          RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL            CODE  FREQUENCY (PERCENT)   (PERCENT)   (PERCENT)

Not indicated                0        57      91.9        98.3        98.3

Indicated                    1         1       1.6         1.7       100.0

                             9         4       6.5     MISSING       100.0
                                 -------   -------     -------
                         TOTAL        62     100.0       100.0

VALID CASES      58      MISSING CASES     4
```

```
Business Survey

Q28A     Member of East Edm Bussiness Ass'n

                                          RELATIVE    ADJUSTED   CUMULATIVE
                                ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL            CODE  FREQUENCY (PERCENT)   (PERCENT)   (PERCENT)

Yes                          1        31      50.0        53.4        53.4

No                           2        27      43.5        46.6       100.0

                             9         4       6.5     MISSING       100.0
                                 -------   -------     -------
                         TOTAL        62     100.0       100.0

VALID CASES      58      MISSING CASES     4
```

```
Business Survey

Q28B      Willing to contribute time etc

                                          RELATIVE    ADJUSTED    CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY      ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)     (PERCENT)

Yes                        1         15       24.2        25.4          25.4

No                         2         10       16.1        16.9          42.4

Don't know                 3         34       54.8        57.6         100.0

                           9          3        4.8     MISSING         100.0
                                -------    -------     -------
                       TOTAL         62      100.0       100.0

VALID CASES      59      MISSING CASES     3
```

```
Business Survey

Q29       Participate in joint marketing etc

                                          RELATIVE    ADJUSTED    CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY      ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)     (PERCENT)

Yes                        1         14       22.6        23.7          23.7

No                         2         11       17.7        18.6          42.4

Don't know                 3         34       54.8        57.6         100.0

                           9          3        4.8     MISSING         100.0
                                -------    -------     -------
                       TOTAL         62      100.0       100.0

VALID CASES      59      MISSING CASES     3
```

```
Business Survey

Q30A      Contribute financially to improvements

                                          RELATIVE    ADJUSTED    CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY      ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)     (PERCENT)

Yes                        1          1        1.6         1.8           1.8

No                         2         20       32.3        36.4          38.2

Don't know                 3         34       54.8        61.8         100.0

                           9          7       11.3     MISSING         100.0
                                -------    -------     -------
                       TOTAL         62      100.0       100.0

VALID CASES      55      MISSING CASES     7
```

```
Business Survey

Q30B      Increased local taxes

                                          RELATIVE    ADJUSTED    CUMULATIVE
                               ABSOLUTE  FREQUENCY   FREQUENCY      ADJ FREQ
CATEGORY LABEL          CODE  FREQUENCY  (PERCENT)   (PERCENT)     (PERCENT)

Not indicated              0         11       17.7        91.7          91.7

Indicated                  1          1        1.6         8.3         100.0

                           9         50       80.6     MISSING         100.0
                                -------    -------     -------
                       TOTAL         62      100.0       100.0

VALID CASES      12      MISSING CASES    50
```

```
Business Survey

030C      Voluntary donations

                                       RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)

Not indicated            0          8       12.9        66.7        66.7

Indicated                1          4        6.5        33.3       100.0

                         9         50       80.6     MISSING       100.0
                              -------    -------     -------
                     TOTAL         62      100.0       100.0

VALID CASES       12      MISSING CASES     50
```

```
Business Survey

030D      Fund raising activities

                                       RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)

Not indicated            0          5        8.1        41.7        41.7

Indicated                1          7       11.3        58.3       100.0

                         9         50       80.6     MISSING       100.0
                              -------    -------     -------
                     TOTAL         62      100.0       100.0

VALID CASES       12      MISSING CASES     50
```

```
Business Survey

030E      Other

                                       RELATIVE    ADJUSTED   CUMULATIVE
                             ABSOLUTE  FREQUENCY   FREQUENCY    ADJ FREQ
CATEGORY LABEL        CODE  FREQUENCY  (PERCENT)   (PERCENT)   (PERCENT)

Not indicated            0         12       19.4       100.0       100.0

                         9         50       80.6     MISSING       100.0
                              -------    -------     -------
                     TOTAL         62      100.0       100.0

VALID CASES       12      MISSING CASES     50
```

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